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ABSTRACT

This volume on leadership practices is designed to serve as a professional handbook for directors of vocational education. Ten major areas of educational responsibility are discussed: (1) selection and improvement of staff (e.g., job descriptions, tenure, and evaluation of teacher effectiveness); (2) curriculum development (e.g., advisory committees, curriculum research, and development of lesson plans); (3) supervision of instruction (e.g., individual conferences with teachers, classroom visitation, and use of consultants); (4) student personnel relations (e.g., pupil census, discipline, and job placement); (5) selection and use of instructional resources (e.g., evaluation of printed materials and selection of instructional equipment); (6) development and maintenance of school plant (e.g., desirable facility characteristics, renovations, and financing); (7) appraising the school program (e.g., use of the school survey, advisory committees, and outside consultants), (8) community relations and participation (e.g., relations with students, parents, and community agencies); (9) financing, budgeting, purchasing, and business management; and (10) relations with special services (e.g., adult education, cafeteria, and transportation). Other chapters deal with the nature and function of leadership communication skills, and office and time management. (JH)

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LEADERSHIP PRACTICES

for

DIRECTORS

of

VOCATIONAL EDUCATION

EDITOR AND COMPILER

LLOYD W. DULL

CE 022 294

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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on
LEADERSHIP PRACTICES
for
DIRECTORS OF VOCATIONAL EDUCATION

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Vocational and Career Education and School Food Services

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FOREWORD

Americans must be confronted constantly concerning the importance of education. Thomas Jefferson said, "If a nation expects to be ignorant and free in a state of civilization, it expects what never was and never will be." Horace Mann stated, "If ever there was a cause—if ever there can be a cause worthy to be upheld by all of the toil and sacrifice that the human heart can endure, it is the cause of education." Abraham Lincoln said, "I view education as the most important subject we as a people can be engaged in." Many other quotations from worthy American leaders on the role of education in the shaping of the United States of America could be added here.

The impact which directors of vocational education can make on the future of young people and their communities is immense. This book describes the leadership role of vocational directors in the exercise of their duties and responsibilities. This leadership should motivate youth to be eager learners and productive workers.

The leadership challenge for directors of vocational education is to evolve democratically with the aid of supervisors, teachers, students, parents, and community citizens the type of curricular programs that will prepare students for the kind of society in which we all wish to live.

Franklin B. Walter
Superintendent of Public Instruction
Ohio Department of Education

PREFACE

This volume is developed to serve as a professional handbook for directors of vocational education. It deals with the major areas of educational responsibility of vocational directors.

All education is judged by its effect on the behavior of students. The importance of this book can be judged by its effect on vocational directors, that is by its success in assisting them to create conditions conducive to effective learning in vocational education.

The vocational director must work closely with the superintendent and local supervisors and principals in the performance of their assigned functions. This performance depends upon the exercise of leadership of the activity in cooperation with many persons, e.g., teachers, students, parents, and community people. This leadership must result in the development and achievement of worthy goals and objectives through effective vocational education programs.

Together with the board of education, the superintendent, local principals, and supervisors, the director can set to a large extent the tone and mode of operation of vocational education in a school district.

Working under the direction of the superintendent, the director of vocational education has leadership responsibility over a number of personnel and specialized functions in the process of securing the best vocational education program possible for a school district. These functions are discussed in detail in this book. The major functions are:

Selection and Improvement of Staff
Curriculum Development
Supervision of Instruction
Student Personnel Relations
Selection and Use of Instructional Resources
Development and Maintenance of School Plant
Appraising the School Program
Community Relations and Participation
Financing, Budgeting, Purchasing, and Business Management
Relations with Special Services

We are most grateful to the Ohio educators who have written the chapters of this book. The educational information in this book should serve as a valuable leadership resource for directors of vocational education for the full decade of the 1980's.

Byrl R. Shoemaker, Executive Director
Vocational and Career Education
and School Food Service

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CHAPTER 1

NATURE AND FUNCTION OF LEADERSHIP

Byrl R. Shoemaker

A person employed in a managerial role in vocational education, even in the upper echelons of such positions, will normally identify themselves as a director, a supervisor, a superintendent, a principal, a president, in relationship to their responsibilities and they may even admit to being an administrator. Very few persons, however, identify themselves as a leader in vocational education, or as one having leadership responsibilities in relationship to program development and improvement. Such attitudes stem probably from the sense of awe or admiration that we have felt for some persons who have attained outstanding leadership positions in which their influences have affected a state, nation or the world in such diverse areas as politics, art, science, religion, sports, industry, commerce, or any other of a number of fields to be mentioned. Massive publicity given to such great religious leaders as Pope John Paul II or Billy Graham or such political or national governmental leaders such as four contemporaries during World War II in the persons of President Roosevelt, Prime Minister Churchill, Premier Josef Stalin and Chancellor Adolf Hitler make all of us hesitant to identify ourselves in any way as their equal in stature or responsibilities.

I must admit, however, that I have been paid to serve in a leadership behavior role in vocational education since July 1, 1944. From 1944 to 1946 my responsibilities were those of a curriculum officer in a naval technical school during which time, by action of Congress and the Naval Department, I was declared to be both an officer and a gentleman. From September 1, 1946 until the present time I have been paid by the taxpayers at the local level and then at the state level for leadership behavior in connection with the vocational education program in Ohio. It is possible that some may claim that I have been taking money under false pretenses, but it is a fact that I have been able to retain a position and function to the satisfaction of my superiors, as a local supervisor of trade and industrial education, a regional supervisor and teacher educator of trade and industrial education, an assistant state supervisor and later a supervisor of T & I, and since July 1, 1962, as state director of vocational education for the state of Ohio. I do not make this statement to either brag or complain, but merely to point out that I and any other person accepting such a responsibility also accepts the responsibility for providing effective leadership behavior.

I am very willing to admit that my efforts toward effective leadership behavior have been more effective in some periods than at other times. Much of the responsibility, and perhaps the major responsibility, for such effectiveness rests with the individual and we will discuss the issue of leadership behavior of the individual a little later in this chapter. Effective leadership behavior is, however, directly related to the quality of the interrelation with and behavior of members of a group. At the outset, therefore, let me identify some of the primary motivations of individual behavior which may better explain reasons why people behave as they do. In a paper presented to a class in administration at Ohio State University, Dr. Harold R. Capener, a professor at that university, gave one classification of these as follows:

1. All behavior is goal-oriented. This simply means that there is a reason for everything that people do.
2. All behavior is self-oriented. This implies that we always have ourselves in mind first when we carry out any particular action.
3. Each individual's behavior is some product of all his past experiences. This means we cannot think or act or have feelings about anything with which we haven't had some kind of experiences.
4. The behavior of others tends to be judged or evaluated on the basis of our own standards, not theirs. This suggests that we can only interpret the behavior of others in the light of our own experiences. If our experience has been quite different, we may be making judgments on entirely different sets of assumptions.
5. All individuals have a set of basic needs which they are constantly striving to satisfy. Such basic needs can generally be identified as physical, social, ego, orientation, and security.
6. People like to participate in situations or activities which are comfortable and which satisfy their needs. They tend to withdraw from things which are unpleasant, dissatisfying, or which fail to meet their needs. This principle tells us that in the planning of programs or activities it is well to keep in mind the needs and interest of the potential consumers.

7. Different positions in a situation will call for different behavior, even though the philosophy, goals and values may be the same. A vocational director and a parent may be interested in improvement of the quality of education in a community; however, each may favor entirely different approaches or techniques in accomplishing this goal.

LEADERSHIP BEHAVIOR, THE INDIVIDUAL AND THE GROUP

For many years researchers have attempted to identify and explain the competence known as leadership behavior. Early efforts in leadership studies attempted to identify leadership competencies through the study of human traits. It seems so reasonable to assume that if a person has the type of traits exemplified in the Boy Scout laws, namely: trustworthy, loyal, helpful, friendly, courteous, kind, obedient, cheerful, thrifty, brave, clean, and reverent, all these traits or certain selected ones of them would provide the key to good leadership behavior. Stogdill, in his review of the literature in 1948, stated, "The findings suggest that leadership is not a matter of passive status or of the mere possession of some combination of traits. It appears, rather, to be a working relationship among members of a group in which the leader acquired status through active participation and demonstration of his capacity for carrying cooperative tasks to completion . . . problems which appear to be in need of thorough investigation are those relating to factors which condition social participation, insight into situations, mood control, responsibility and transferability of leadership from one situation to another. Answers to these questions seem basic, not only to any adequate assessment of the personal qualifications of leaders, but also to any effective training for leadership."[1]

In a paper delivered at the American Psychological Association meeting in September, 1950, Dr. Carroll L. Shartle, then Director of the Personnel Research Board at The Ohio State University, gave the following answer to the question, "Who is a leader?" He suggested that we may define a leader in several ways, such as the following:

1. an individual who exercises positive acts upon others
2. an individual who exercises more or more important positive influence acts than any other member or group of an organization he is in
3. an individual who exercises most influence in goal setting or goal achievement of a group or organization
4. an individual elected by a group of leaders
5. an individual in a given office or position of apparently high influence potential

In examining the role of leadership in vocational education, definition number 5 would apply to all superintendents, directors, and supervisors who have been appointed to their positions by boards of education or their higher administrative levels. Very few of us who have accepted leadership positions in vocational education have the type of diabolical mind or the personal magnetism of an Adolf Hitler, nor do we have the fervor, personal magnetism, or speaking ability of a Billy Graham. Nevertheless, as soon as we accepted the appointment to a position of leadership in vocational education, we were required to accept both the responsibility and the authority vested in such a leadership role. It is recognized the above listed definitions are not mutually exclusive, in that a person in a given office as defined under number 5 might also fit into one or more of the other four categories.

Since we are talking about leadership in terms of vocational education, as per definition number 5 above, leadership behavior in such a role does not take place in a vacuum, but in relationship to a group or organization of which the leader is a part. Dr. Carroll Shartle, referred to above, has suggested that we can describe the group to which the leader belongs, using one of several methods:

1. formal organizational chart, what written material, diagrams, reports and other data are available which describe how the organization works, or perhaps better, how it is supposed to work.
2. sociometric ratings, with whom do the members of the organization work—this is sometimes called the informal organization or interpersonal chart.
3. measures of group morale
4. group dimensions, the basic dimensions of a group or organization, how the groups differ in these dimensions.

John K. Hemphill and Charles M. Westie, who were members of Dr. Carroll Shartle's staff, established a method of describing groups in definitions of fourteen dimensions. These men also developed scales whereby a group could be described by its members or by outside observers. The group dimensions they described are as follows:

1. ***Autonomy*** is the degree to which a group functions independently of other groups and occupies an independent position in society. It is reflected by the degree to which a group determines its own activities, by its absence of allegiance, deference and/or dependence relative to other groups.

2. ***Control*** is the degree to which a group regulates the behavior of individuals while they are functioning as group members. It is reflected by the modifications which group membership imposes on complete freedom of individual behavior and by the amount or intensity of group-derived government.

3. ***Flexibility*** is the degree to which a group's activities are marked by informal procedures rather than by adherence to established procedures. It is reflected by the extent to which duties of members are free from specification through custom, tradition, written rules, regulations, codes of procedure, or even unwritten, but clearly prescribed, ways of behaving.

4. ***Hedonic Tone*** is the degree to which group membership is accompanied by a general feeling of pleasantness or agreeableness. It is reflected by the frequency of laughter, conviviality, pleasant anticipation of group meetings, and by the absence of griping and complaining.

7. ***Participation*** is the degree to which members of a group apply time and effort to group activities. It is reflected by the number and kinds of duties members perform, by voluntary assumption of non-assigned duties and by the amount of time spent in group activities.

8. ***Permeability*** is the degree to which a group permits ready access to membership. It is reflected by absence of entrance requirements of any kind, and by the degree to which membership is solicited.

9. ***Polarization*** is the degree to which a group is oriented and works toward a single goal which is clear and specific to all members.

10. ***Potency*** is the degree to which a group has primary significance for its members. It is reflected by the kind of needs which a group is satisfying or has the potential of satisfying, by the extent of readjustment which would be required of members should the group fail, and by the degree to which a group has meaning to the members with reference to their central values.

11. ***Size*** is the number of members regarded as being in the group.

12. ***Stability*** is the degree to which a group persists over a period of time with essentially the same characteristics. It is reflected by the rate of membership turnover, by frequency of reorganizations and by constancy of group size.

13. ***Stratification*** is the degree to which a group orders its members into status hierarchies. It is reflected by differential distribution of power privileges, obligations, and duties and by asymmetrical patterns of differential behavior among members.

14. ***Viscidity*** is the degree to which members of the group function as a unit. It is reflected by absence of dissension and personal conflict among members, by absence of activities serving to advance only the interests of individual group members, by the ability of the group to resist disrupting forces, and by the belief on the part of the members that the group does function as a unit.[2]

The information on the group dimensions, without further information on the rating scales, is included here on the basis of the importance that should be placed upon the analysis which a person should make of a group to which he is assigned in a leadership role.

LEADERSHIP BEHAVIOR AND CONTROL OF THE MASSES

Having assumed the person assigned to a leadership role, and having outlined the nature of a group, within our nation one immediately begins to think in terms of what we have identified as a leadership ideal, that of democratic leadership. It may be well to understand that the concept of democratic leadership is a relatively new phenomenon and somewhat in the experimental stage in terms of governing of masses of people over a long period of time. The authoritarian type of leader has been better known in history. It may be interesting to note that not all of the old philosophers believed in or supported a concept of democratic leadership, basically because they perceived the groups or masses in a rather derogatory light. Alvin Gouldner, in his book entitled *Studies in Leadership*, gave some insight into, the base for, and nature of authoritarian type of leadership. Gouldner suggests that the writings of Aristotle and Machiavelli on leadership brought out two distinct images that have shaped social and political theories. One is the concept of mindless masses, the second is the concept of the strong-willed leader. In early civilizations tyranny was a means of gaining power other than by hereditary means. Thus, masses were brought into political consideration as a means for the tyrant to gain power. Gouldner reported that his study showed that conservatives feared both the mindless masses and the charismatic leader, and favored an order of power succession, a hierarchical structure of society.

Analyses of mass psychology point to the tools used by charismatic leaders in order to gain support of the masses. Basically such leaders

make appeals to the magical sense of people, through such patterns as

1. ritual and ceremonial
2. rhythmic marching, singing in order to produce an oceanic feeling
3. mass incantations and singing
4. dramatic appearance of the leader

Gouldner outlined the LeBonns theory regarding such leadership as follows:

1. In the mass, individual differences are lost.
2. This leveling makes it possible for the leaders to gain control through affirmation repetition, and contagion.
3. The leader serves as guide and mind.

Gouldner reported that Hitler used the following techniques very effectively:

1. mass demonstration to burn into a man's soul, the proud conviction that though a little worm, he is a part of the great dragon.
2. development of the concept of the leader as a unique, experienced individual, a leader through gift of grace.[3]

Quite unlike a tryannical leader described above, modern sociology and psychology sees leadership as a specific response to specific group situations. Such a concept emphasizes types of leaders rather than a common idea of leadership and leadership as a complex social function depending upon different group needs. As indicated later in this paper, a dictatorial type of leadership does play a part in the behavior of persons assigned to leadership roles in the educational field as well as in the realm of the political and military.

LEADERSHIP BEHAVIOR OF AIRCRAFT COMMANDERS

As a review is initiated of dimensions of leadership behavior, the reader should be reminded that for the purposes of leadership in vocational education we are talking about an individual in a given office or position of apparently high influence potential. It is obvious that this kind of leadership appears only in a social group in which members are interacting and where they perceive themselves as members of the group. The definition of leadership must also assume the members of the group will be working together toward some sort of a goal, which act would imply a social relationship. Finally, the definition assumes the members of the group will assume varying roles and degrees of responsibility for achievement of the common goal.

Within this context the question might be asked, "What is meant by the expression 'to lead'?" It is believed that the best answer to this can be gained from a review of the Air Force Studies on Leadership. One quick response, however, might be drawn from writings by J. K. Hemphill in which he proposed the following definition: "To lead is to engage in an act which initiates a structure and the interaction of group members as part of the process of solving a mutual problem. Note first that the initiator of the act is himself a group member. Note second the definition of a mutual problem as a situation involving two or more individuals, each of whom perceives the situation as dissatisfying and which requires some behavior on the part of the other if either (any) is to be satisfied."[4]

The study on leadership attitudes of aircraft commanders based on a technical report prepared by the Ohio State University Foundation, has been abstracted by Andrew W. Halpin and Robert W. Hites as follows:

This report on the development of a leader Attitude Questionnaire is based upon data obtained from 76 B-29 and B-50 aircraft commanders and their crews, who attended Combat Crew Standardization School at MacDill AFB during the first half of 1951. A twenty-two item questionnaire was constructed for the purpose of measuring the commanders' attitude toward their superiors and subordinates. From a factor analysis of the responses, six leader attitudes were identified:

1. Consideration for Subordinates
2. Awareness of Dual Responsibility
3. Orientation to Evaluation by Superiors
4. Identification with Superiors
5. Orientation to Subordinates
6. Recognition of the Authority Structure

An Analysis was made of the relationship between the commanders' scores on these six leader attitudes and:

1. The behavior of these commanders as described by their respective crews on a Leader Behavior Description Questionnaire which measures two leader behavior dimensions: Consideration and

Initiating Structure (i.e., defining how crew members will interact: establishing clear-cut patterns of organization, channels of communication, etc.).

2. The crew members' rating of their commander's (a) proficiency, and (b) cooperation, their (c) confidence in him (d) willingness to go to combat with him, and (e) assessment of him as a friend.
3. The (a) Harmony, (b) Procedural Clarity, (c) Intimacy and (d) Stratification, in the crew, as reported by the crew on a Crew Description Questionnaire.
4. The crew members' ratings of each other in respect to the characteristics listed above under (2); and their attitude on two additional questions: (a) "What is your attitude toward remaining with your present crew?" and (b) "At an overseas base, how willing would you be to fly combat missions with crews other than your present crew?"

Significant relationships were found between commanders' leader attitudes and the four other sets of variables, indicating that the commander's attitudes influence the crew members' description and evaluation not only of the commander, but also of the crew members themselves. The principal findings are:

1. Commanders who express an attitude of Consideration for Subordinates are perceived by their crews as considerate leaders.
2. The crew's willingness to go to combat with the commander and estimates of him as a friend are related significantly to his Consideration for Subordinates. The crew members of commanders who score high on this attitude perceive their crews as harmonious and not stratified; prefer to remain with their present crews; and are relatively unwilling to fly combat with other crews.
3. Commanders who score high on Identification with Superiors are described as low in Consideration behavior.
4. Commanders who score high on Awareness of Dual Responsibility (i.e., who are reluctant to take a stand in assuming their personal command responsibility) are rated adversely by their crews, especially on proficiency. The crew members of these commanders characterize their crews as ***not*** harmonious, and lacking in procedural clarity: rate each other low both on proficiency and cooperation; and are relatively willing to fly their combat missions with other crews.
5. Commanders who score high on Orientation to Evaluation by Superiors are rated low on cooperation.
6. Commanders who score high on Identification with Superiors are less chosen as friends. Furthermore, their crew members rate each other low on proficiency, and are relatively willing to fly their combat missions with other crews.
7. Crew members of commanders who score high on Recognition of Authority Structure perceive high Procedural Clarity within the crew, rate each other high on friendship, and prefer to remain with their present crew.
8. A comparison between (a) crews whose commanders score high on Consideration for Subordinates and low on Identification with Superiors, and (b) crews whose commanders score low on the first attitude and high on the second, shows that the first group of crews rate themselves higher on proficiency, express a greater desire to remain with their present crew, and are less willing to fly their combat missions with other crews.

In short, the present evidence suggests that constructive crew attitudes are promoted by aircraft commanders who score:

1. High on Consideration for Subordinates
2. High on Recognition of Authority Structure, and
3. Low on Awareness of Dual Responsibility.[5]

The two major dimensions, initiation and structure, for purposes of our discussion of leadership in vocational education, could be summarized and illustrated in the following manner:

a. Consideration of others

(1) Sensitivity to feelings of others
(2) Friendship and doing favors
(3) Invite participation of group

b. Initiation of structure

(1) Definition of roles

(2) Establishment of communication
(3) Determination of ways to get job done

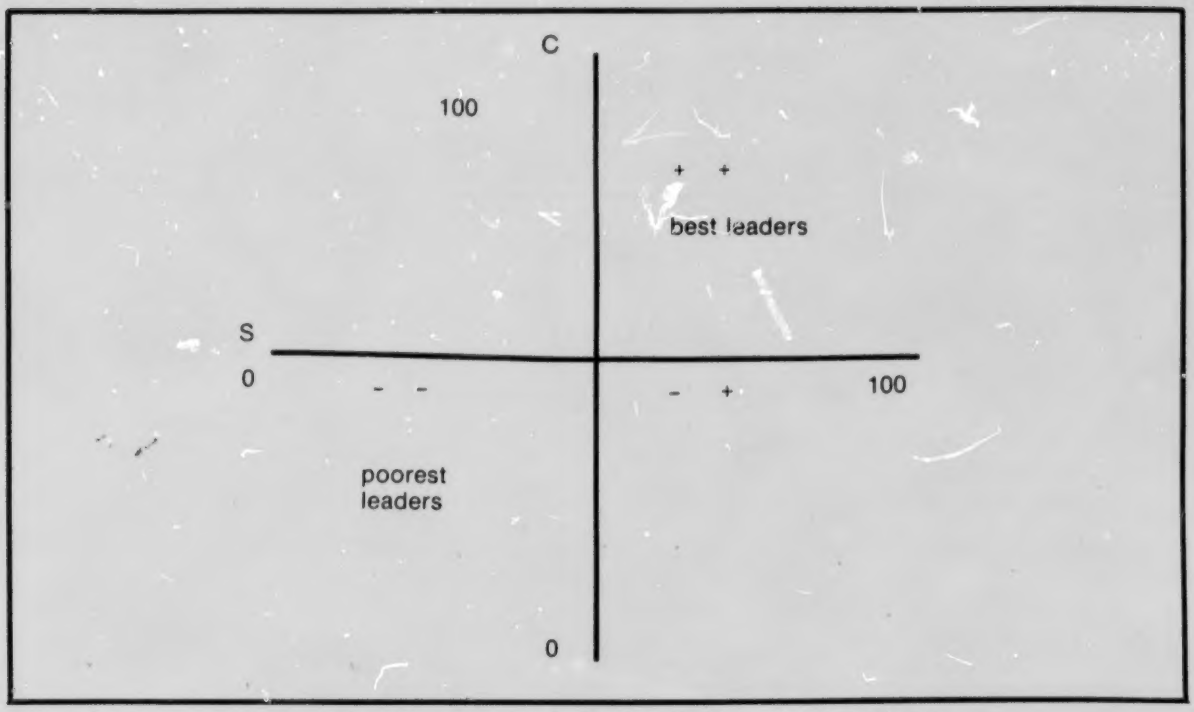

Figure 1. Quadrant to represent consideration and structure dimensions of leader behavior

The immediate question which comes to a person's mind, following a review of the Air Force Studies, would be the applicability of such research to leadership outside the military. Obviously, in the military there is an authoritarian pattern involving a strong hierarchical organization which relates directly to the area of concern for initiation of structure, but very little to the area of showing consideration

Dr. Roald Campbell, while a professor of school administration in the College of Education at Ohio State University, subsequent to an educational seminar conducted in 1954 with the assistance of Kellogg funds, and focused upon the area of leadership development, adapted the Air Force Leadership Behavior model to a study of superintendents of schools. The results of the study by Dr. Campbell and others, conducted with superintendents of schools in the state of Ohio, indicated that the same factors applied to successful leadership positions involving educational leadership. Superintendents of schools who rated high in both ability to initiate structure and ability to show consideration were judged as effective leaders by both superiors and subordinates, while those superintendents who rated low in both of these abilities not only were judged as inferior leaders by their superiors and subordinates, but seemed to be headed toward termination of employment.

From research it would appear that persons assigned to leadership roles in vocational education would be most successful if they can demonstrate these two leadership capabilities and that every effort should be made to improve their competence in such abilities. The disappointing part of all research, however, is that no one has conducted a study to determine how persons achieve competence in these abilities or what type of experiences or instruction would enhance the development of them. We know the major factors essential for successful leadership behavior and can analyze persons in leadership roles to judge their competence, but we do not have any idea how to develop them.

AWARENESS OF DUAL RESPONSIBILITY

A third factor in the success of aircraft commanders, as judged by constructive crew attitudes, was that of a low awareness of dual responsibility on the part of the aircraft commander. Studies have been done in industry about the identification of the first-line supervisors in relationship to both their superiors and the group for whom they are responsible. Such studies correlated with the results of the research on the aircraft commanders. The industrial research considered three positions of the first-line supervisor which would essentially be parallel to that of the aircraft commanders. The possible positions would be as follows:

1. to assume themselves an integral part of the management group with responsibilities for directing the activities of the members of the work group
2. a position between the group of superiors and the group for which they are responsible, a position in which they are not a part of either group.
3. a third position as a member of the group responsible for the group and for interpreting the requirements of the superiors to the members of the group with whom they work.

The results of these studies in industry indicated clearly the first-line supervisors should see themselves as a part of the group and responsible for the group. In such a relationship they seemed to be more effective, secure and accepted by the group members. The worst of the three conditions described above would be that in which the individual sees themselves belonging neither to the group of superiors nor group of subordinates.

LEADERSHIP METHODS OR STYLES

Let's turn now to a review of some leadership methods or styles which may be followed by persons assigned to leadership roles. Earlier in this paper a description was given of a charismatic, or political, leader who functioned on an authoritarian basis. It is entirely possible for a person assigned to a leadership role in keeping with our definition to function in such an assigned leadership role in an authoritarian manner. One must not assume that all persons functioning in an authoritarian manner will necessarily fail in that leadership role. Under conditions in which the person assigned the leadership role has good judgment, and the problem to which the group is addressed does not call for a high degree of independent thinking or activity on the part of the members of the group, and the acquiescence of the members of the group to such leadership, the authoritarian method of leadership can function with reasonable effectiveness. The positive characteristics of such leadership method will normally relate to a consistent pattern of activity, reasonably quick decisions, and the centralization of both authority and responsibility. The negative aspects of such leadership include limitations of solutions to problems to the competencies possessed by the authoritarian leader, since little use will be made of the ideas or initiative of the members of the group. Such leadership will gradually diminish the ability of the group to function effectively on problems and over a period of time destroy the potential of a member of the group to accede to the leadership role when the authoritarian leader leaves or dies.

A second style or method of leadership is that of the laissez-faire type of leader. This style of leadership is characterized by the type of person who does not wish to make decisions which may be unpopular with their superiors or peers, or which might include an element of risk which could damage their position in the hierarchy. Progress can be slow under such a leadership method on the basis of hesitancy to reach out for change and improvement. A person following this method tends to put off until tomorrow anything which does not have to be done today. Unreasonable and burdensome documentation as a basis for any decision for change is one of the techniques used by such a leader to delay a decision. Status quo, not progress, is the password for laissez-faire leadership.

A third method, or style, of leadership behavior is that of democratic leadership. Obviously, democratic leadership has been the ideal in our nation and promoted by colleges of education as "the" leadership method or style to be achieved by all persons in educational leadership roles. There is no question that an effective pattern of democratic leadership is the soundest method available in terms of effective utilization of the talents of the members of the group, efficiency and effectiveness in task completion or goal achievement, and a basis for ascension of a member of the group to a leadership position in the event of the loss or absence of the person in the leadership role. The problems that may be faced with this type of leadership, however, do not rest in the desires of the leader but in the makeup of the group with which they are working. In education, it would be a rare member of either a group of

teachers or administrators who would not espouse the values of democratic leadership and loudly demand that the leader of the group to which they belong should function in a democratic manner. Before a leader can use a democratic method of operation, however, each member of the group must be willing to participate effectively in a democratic role, have a commitment to the problem, solution, or goal to which the activities of the group are addressed, and possess the competence to make a significant contribution.

The desire of a person to function as a democratic leader is not enough, and a person who blindly follows a democratic leadership style, without a careful analysis of the strengths and weaknesses of the members of the group, can face disaster. An actual case in point was a principal in a high school in a town of 25,000 who was selected for that role by the board of education and succeeded a gentleman who had been principal of the high school for many, many years. The retiring principal had run the high school as a benevolent, or not so benevolent, dictator. He was clearly an autocratic type of leader, and while the faculty growled and grumbled, they followed his dictates. Halls were clean, discipline was good, and activities were reasonably managed. The newly-assigned principal, imbued with the desire to function as a democratic leader, quickly received a broad verbal commitment from the teachers in support of his democratic ideals, but school morale declined, and discipline got worse. In the spring of the year, as the school seemed to be getting more and more out of control, the principal called all the students into the auditorium, explained to them that he thought they ought to solve the problem, withdrew all faculty from the auditorium so that the students could democratically come to positive solutions. The results were chaos. Needless to say, the principal did not return to the high school in a leadership role the next year.

The weakness in this case was not the concept of a democratic style of leadership, but in the misjudgment of the principal in terms of the skill and commitment of the teachers to function in a truly democratic manner and the lack of experience on the part of both the students and the teachers in participating in such a democratic pattern. John Bartky, an author on leadership styles, who was located in California, suggests that a person assigned a leadership role in a group must first assess the type of leadership to which the members of the group are accustomed and the skill and commitment of the members in relationship to the democratic leadership method. The assigned leader must start by providing the type of leadership behavior to which the group is accustomed and then gradually educate the group to participate effectively under a democratic leadership style.

There is little in literature which describes methods for leading a group from an authoritative style of operation to a democratic style or method of leadership. Yet the success of the person assigned to a leadership role may well rest in their ability to educate and to motivate the group with whom they are working to adapt to, and effectively participate in, such a leadership pattern. The assignment of problems to small subcommittees of the group can be one way of developing both competence and attitude. Initially, however, problems must be carefully selected and carefully delineated so the effects of the committee recommendations cannot be disastrous in terms of a total project. Care must be used to determine that a person with a particular axe to grind and a fair measure of competence does not use the functioning of the subcommittee to attempt to impose their will upon the group and the leader. The scope of the problems and decisions with which the members of the group are involved can be gradually expanded as the members of the group show both competence and motivation to utilize their skill and initiative toward achievement of the task or goal assigned to the total group.

There has grown up a fourth style method of leadership which might be defined as that of a democratic manipulator. It is very possible the person described as the new principal above could move on to another similar position in a different school district. In his new role he would not yet be able to deny his heritage of training as a democratic leader gained in the administrative education program of his alma mater. As a sadder and wiser person, however, he may assume the role of a democratic manipulator, rather than embarking upon the long, arduous task of understanding the nature of the group with whom he would be working, the type of leadership with which they had experience, and developing the judgment to use that type of leadership until they could educate them to true democratic leadership processes. The democratic manipulator can be best known by the techniques used. They may personally come to a solution to a problem or condition in the school, discuss the problem and possible solution with members of the faculty until they find several members who seem to have the same sense of judgment about the problem as the leader has. The democratic manipulator publicly appoints these faculty members to a committee to come up with a solution to the problem, then widely acclaims the value of the democratic method and the wisdom of the committee members when they report back to them the solution that they wanted in the first place.

A skillful democratic manipulator will function under the guise of democracy, when in reality they release no more of the energy or the ideas of the members of the group than does an authoritarian

type of leader. If he is skillful at his process of democratic manipulation, however, he can keep down the resentment the members of the group would automatically have toward an autocratic leader, apparently keep them involved in the decisioning process, but leave them weak in terms of taking over true responsibility should the leader leave or be absent.

It must not be assumed that any person assigned to a leadership role will function entirely in one style or mode of leadership of the four described above. It is obvious that a person assigned to a leadership role may, over a period of leadership responsibility, use all four of the methods described above. A sense of timing, the correct choice of leadership style for a particular situation, and skill in the chosen leadership method are probably the keys to successful leadership behavior. Any person in a leadership role who insists upon making all decisions democratically will probably become a tiresome bore, diminish the effectiveness of the group on problems which challenge their ability, and be somewhat unproductive in terms of time and efficiency. Any person in a leadership role who insists upon making all the decisions themselves is limiting progress by their own inadequacies.

GROUP MEMBER AND LEADER IDENTIFICATION

Persons aspiring to a leadership role who desire to work with members of a group toward effective democratic leadership processes should be aware of some anti-democratic tendencies that may be present at the personality level of one or more of the members of the groups with whom they are working. Adorno, and others, in a publication entitled *The Authoritarian Personality*, reviewed the construction of a fascism (f) scale. The variables that were selected for development of the (f) scale can reveal a central tendency in an individual as a member of the group. Some of the variables included in the (f) scale are as follows:

1. conventionalism - rigid adherence to conventional, middle class values
2. authoritarian submission - submissive, uncritical attitude toward idealized moral authorities of the in group
3. authoritarian aggression - tendency to be on the lookout for and to condemn, reject, and punish people who violate conventional values
4. anti-interception - opposition to the subjective, the imaginative, the tender minded
5. superstition and stereotyping - the belief in mystical determinates of the individual's fate; the disposition to think in rigid categories
6. power and toughness - preoccupation with the strong-weak, leader-follower dimension; identification with power figures, overemphasis upon the conventional life attributes of the ego; exaggerated assertion of strength and toughness
7. destructiveness and cynicism - generalized hostility, vilification of the human
8. projectivity - the disposition to believe that wild and dangerous things go on in the world; a projection outwards of unconscious emotional impulses
9. sex - exaggerated concern with sexual "goings-on"[6]

Obviously, very few members of any group would have all of these tendencies and very few would tend to have any of the tendencies to a high degree. The person assigned a leadership role in a group, however, should be aware of the nature of these tendencies and the limitations they may place upon effective democratic group action. A person with attitudes matching these variables will tend to be an authoritarian type of personality.

J. K. Hemphill, in an article entitled "The Leader and His Group," made a study of 500 groups in relationship to leadership of such groups. As reported in the studies listed earlier in this paper, Hemphill suggested there are no absolute leaders, since successful leadership must take into account the specific requirements imposed by the nature of the group which is to be led. The results of his study suggest

1. Speed in arriving at decisions is a critical attribute of successful leadership; confidence is important.
2. Authoritative leadership is most successful in groups which restrict membership.
3. Groups of low stability discard leaders who lose prestige.
4. Leaders are under less pressure to maintain prestige in stable groups.
5. Leaders subordinate personal gain for group welfare more often in groups with a single purpose and those which exert a high degree of control over the behavior of members.
6. The successful leader does not give the impression that he is superior to his group.
7. Lack of emotional control is less acceptable as a part of successful leadership in the highly structured group than in the informal group.[7]

Hemphill again found that one could not follow the traits concepts as relates to leadership.

As a person assigned the leadership role, beware of the agitator who poses as the savior of

all established values and his country, but constantly dwells on the dark, sinister sense of foreboding of impending doom. Vaccines against the authoritarian agitator are two-fold: one, truth to enlighten the people: two, description of the agitator's technique and methods.

A. W. Halpin, in his article, "Human Relations in Education," recognizes that there is a large gap between technical skills and production, and social skills for securing cooperation. Halpin suggests that we learn the techniques for effective group action by group participation. In order to train persons in the skill of leadership, it is necessary to change human behavior. Attitudes and values resist change through didactic means. He indicates that we cannot change behavior by forcing change and that attitudes, sentiments, and feelings are psychological rather than logical. In the article it is suggested that one approach to changing behavior is by changing social conditions so persons get new insight into themselves. It is further stated that unhealthy attitudes to be changed must be free to be expressed.

OBSERVATIONS AND LEADERSHIP EXPERIENCE

A number of years of experience in an assigned leadership role and observation of persons in such assigned roles in both industry and education have caused me to develop some ideas and concepts which may or may not have a research base, but which I believe deserve at least a mention for your consideration. When I was working in industry there was a supervisor who was particularly perceptive in regard to the moods and attitudes of the workers assigned to his group. When he observed a worker having a particular problem in a job to which he was assigned, or seemed to have trouble adjusting to the workload on the basis of some personal problem or issue, he would find a way to personally invest himself in relieving that person of part of his responsibility or to spend time working with the individual to find a solution to a particular problem. He seemed to make an effort and to succeed in having a positive, cheerful outlook on conditions or problems facing the entire group. Yet the same person could be very strict and unyielding with a person who could be identified as a "goof-off." In case of a crisis he would be there, involved, and coordinating the activities.

Within the same shop there was another person assigned to a leadership role in another section who, when a crisis would occur, had the habit of grabbing hold of some part of the workload, and be unavailable for any question or help in coordinating the activities of the other persons toward a solution to the problem. This left the members of the group to wrestle with the problem alone or face the statement, "Don't bother me; can't you see I'm busy?" It is my observation that the first supervisor described above illustrates the better leadership behavior.

Another experience in industry taught me that a leader can become too involved in actual work at the expense of planning and organization. At one point during my employment in industry, I was responsible for supervising a small group of workers over a specified time during the work turn, in which a designated amount of work had to be completed each night. At the end of the period of time the work group would leave to go to another assignment. If the work was not finished I was responsible for finishing the work alone. It did not take me long to learn that I had better make sure that the work was organized, materials fed to the workers regularly, and that the material flowed to the workplace and away from the workplace in an organized manner so that I could get the most out of the people while they were there. Initially I had thrown myself into the work along with the other men, not paying adequate attention to planning and organization, and at times the whole group would be standing around until the material could be organized for them to continue their work. I learned the hard way the importance of planning and organization on the part of the person assigned the leadership responsibilities.

Another experience which may be of interest to persons assigned the leadership role was gained again in an industrial setting when I was working as a member of a group. The immediate supervisor of the group had allowed the group to become somewhat boisterous and involved at times during the work period in antics described in industry as "horseplay." One evening the group had become involved with throwing soft packets of material at each other and as the supervisor was laughing at the antics, in walked the plant manager. The plant manager made no comments to the workers in the group, but had very strong language for, and made very critical comments to, the supervisor regarding his ability to function as a leader or supervisor of the group activities. As the plant manager attempted to leave the front door of the plant he found the doorway blocked by an Austin some of the workers had moved in front of the door; whereupon he returned to the supervisor and fired him on the spot. It was my observation the persons who caused the problem were sorry for all of about ten or fifteen minutes, but the supervisor was out of a job and on the streets the next day. From this experience I came to the conclusion that if I was ever going to be fired as a supervisor, I was going to be fired for something I did, not some action of the members of the group

for whom I was responsible.

It has been my observation that a person assigned to a leadership role in a formal organization receives two appointments to that position. The first appointment is when the superior, or appointing organization, selects and assigns the person to the leadership role in the formal organization. The person so appointed, however, must recognize that their efficiency and progress toward asssigned goals or problem solutions will be somewhat limited until the members of the group with whom they are working decide to accept them as the group leader. Until the acceptance is achieved from the group, cooperation with the assigned leader, or even between members of the group, will be limited. In some cases individuals, or sub-groups, may reject or at least test the person newly assigned to the leadership role.

It has been my experience the second appointment to leadership by the members of the group is extremely important and the length of time between the initial appointment by the superior to that point when the new leader is accepted by the group will vary significantly. I can recall that in one leadership role to which I was assigned, there was one member of the group that never did accept me in the assigned leadership role and could be counted upon to agitate problems with other members of the group. In contrast, acceptance by the members of the group in a subsequent leadership assignment came rather quickly from all members of the group. Such early acceptance made possible effective planning toward solutions to problems and a coordinated response toward achieving such solutions.

Another observation in relationship to leadership behavior deals with the matter of participation by the assigned leader in meetings or activities in which the members of the group are required to participate. It is my belief that participation of the assigned leader in upgrading or inservice programs planned for the group members and attendance at meetings in which they and the group participate rather than the leader standing in the halls, talking while the meetings are going on, can have a positive effect on the attitude of the members of this group toward the ongoing activity.

Recognition of members of the group for outstanding achievement should be done openly, honestly, and in such a manner as to give true recognition rather than to make the individual a butt of jokes concerning the achievement. To the extent that such activities do not impinge upon the responsibility of an individual as a member of the group, encouragement and recognition should be given for activities in which the group member serves in a leadership role in a related activity.

Another observation is that leadership is hard work. Anyone can work hard for a short period of time, and a person in a leadership role must recognize that members of the group have varying capacities for commitment to a given responsibility or task in terms of a time period. It is expected, however, that a person accepting a leadership role must maintain over a long period of time a continuing commitment to the solutions of problems assigned to the group and must possess the energy level essential to face not only the immediate task, but to maintain the focus and efforts of the group toward long-range goals. Energy and enthusiasm may not be required of all persons assigned to leadership roles, but these two attitudes can be used effectively in motivating the efforts of the group.

One final observation is that if the person assigned to a leadership role does not see the job or responsibility assigned to the group as being important, how can they expect any member of the group to feel a sense of importance or excitement as they work on the assigned task? It isn't that the assigned leader should be overwhelmed with their own sense of authority, responsibility, or self-worth, but should share with the members of the group their sense of commitment to achievement of the assigned goal or task, and evidence this attitude in thought, word, and deed. The assigned leader should not be so obsessed with the problems they face that they ignore, ridicule, or overlook the problems faced by or successes achieved by the members of the group.

I would report one final position in relating to leadership behavior that deals with the selection of persons serving in such leadership roles. It has been my pleasure in vocational education to serve as state director of a Division of Vocational Education which is characterized by an outstanding group of persons working as assistant directors and supervisors of the individual services in the division. I believe in the results of research reported earlier in this paper and have attempted to select persons with skills, competencies, and attitudes identified as important in leadership behavior to head the sections within our division. I do not believe that any of these outstanding people work for me, although they all work together for the benefit of vocational education. They have a loyalty to a cause of vocational education and are working on the basis of their own goals and motivations for the improvement, development, and expansion of vocational education in Ohio. I believe this same attitude characterizes the activity and attitudes of the leadership for vocational education in the 102 vocational education planning districts in the state of Ohio.

The best investments in vocational education are investments made in the selection, training, and assignment of persons to leadership roles at the local, state, and vocational levels.

ENDNOTES

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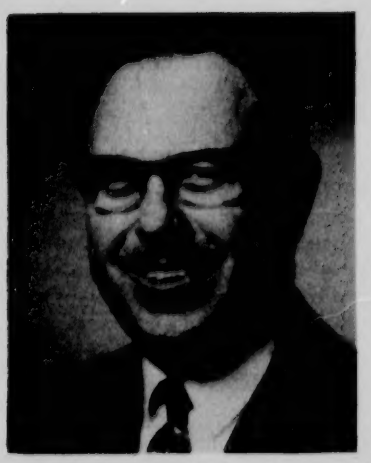

Dr. Byrl R. Shoemaker

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CHAPTER II

RELATIONS IN SELECTION AND IMPROVEMENT OF STAFF

Robert L. Frum

While recognizing that the duties and responsibilities of the director of vocational education vary from school district to school district and that this variance is more pronounced between the comprehensive high school and the joint vocational school, this chapter will focus on the personnel administration functions of the position. Attention will be given to staff recruitment, screening and selection process; staff orientation, motivation, evaluations, and development as well as to those functions related to collective bargaining and legal requirements.

JOB DESCRIPTIONS

Job descriptions were first developed and used in the United States in the 1920's as a part of time-motion studies conducted by industrial researchers. The purpose of the job descriptions was to eliminate unnecessary activities of workers and prevent duplication of effort. The general use of job descriptions in education began in the late 1940's and early 1950's when theorists in educational administration sought improved ways of evaluating teacher performance.[1]

Uses of Job Descriptions: The purpose and functions of job descriptions have been refined and expanded over the years until they have become an integral tool of effective management. Today job descriptions are used to:

1. Establish qualifications for staff selection, retention, promotion and dismissals.
2. Set a fair standard for supervising and evaluating job performances.
3. Clarify employee duties and responsibilities.
4. Reveal inconsistencies, ambiguities, inefficiencies, and overlap in job assignments and work flow.
5. Provide guidelines for personnel planning and budgeting.
6. Provide equitable basis for differentiating compensation levels.
7. Provide guidelines for substitutes and part-time help.
8. Insure that the organization does not discriminate in its hiring and promotion practices due to inaccurate, hypothetical or projected qualifications.
9. Establish accountability for the organization and the actions of its employees.

Job descriptions are directly related to the philosophy of the institution and to its organizational chart. A compilation of all job descriptions within the institution, if accurately written, will provide a composite picture of the mission of that institution.

Developing Job Descriptions: As used today job descriptions are formalized statements which describe the duties and responsibilities, minimum qualifications and lines of supervision for each job title. The description should include:

1. Job Title
2. The job's position in the chain of supervision.
3. The relationships of the job to the ultimate client—the student, and to the objective of the educational program.
4. The major performance responsibilities that make up the content of the job.
5. Indicate the kind and extent of the skills, knowledge and abilities required by the position.

The description may also include the terms of employment, evaluation criteria for the job, and the job review procedure to be utilized.

Developing and writing job descriptions is a difficult task. Descriptions may be based on data obtained through a job analysis or they may be developed jointly by the supervisor and the employee(s). If a job analysis is employed, data relative to the scope, content and limits of the job are obtained by direct observation of all major facets of the position and through personal interviews conducted with all employees with the same job title. Questionnaires may be used to replace the personal interviews. However, the instrument must be designed carefully to elicit the kind of data needed.

Depending on the size of the organization, joint development of the description by the supervisor and the employees may prove to be more expeditious and accurate than the job analysis method.

In writing the job description care should be taken to:

1. Use a terse and direct style.
2. Keep sentence structure simple.
3. Omit all words and phrases which do not contribute necessary information.
4. Begin each sentence with an action verb, third person singular.

5. Emphasize the skills and purposes of the job; do not write a detailed time-motion-method study.[2]

The successful development of a set of job descriptions is a team effort involving the board of education, the superintendent and the administrative staff and all groups of employees. Each contributes in anticipation of a highly desirable goal: a better system of education for every student. If all are aware of the value of job descriptions and if all fully assume their role in the process, then every member of the school system will gain.

IDENTIFICATION OF STRONG STAFF PERSONNEL

Quality education depends more on quality teachers than on any other single factor or combination of factors. Attractive and spacious facilities, modern, up-to-date curriculum guides and instructional materials, and well trained and eager clerical and custodial help are all important ingredients of a positive learning environment. However, neither individually nor collectively will these ingredients make up for an inadequate teaching staff. "A competent staff with a sound educational philosophy, working with virile and dynamic leadership, is an element of the school administrative process for which there is no satisfactory substitute."[3]

One of the major goals of the school administration must be to constantly upgrade the quality of the teaching staff. As with most other aspects of educational administration, there are no discrete steps to accomplish this goal. The process is multidimensional and cyclic in nature and involves identification of the goals and objectives of the institution, evaluation of current staff in terms of those goals and objectives, the development of a comprehensive inservice and staff development program and the recruitment screening and selection of competent staff.

The establishment of goals and objectives which give direction to the organization is treated elsewhere in this publication; teacher evaluation and inservice programs are discussed in a later part in this chapter. Therefore, attention is directed to teacher recruitment, screening, and selection.

The staff selection process begins with the identification of the skills, knowledge and personal attributes which the staff needs in order to achieve the goals and objectives of the school. These goal statements or job objectives, typical duties and responsibilities and qualifications contained in the job description represent a quantitative listing of the personnel needs. Thus, the job description is a basic document used in the recruitment and screening and selection of staff.

Current staff members will possess the needed skills, knowledge and personal attributes in varying degrees. Thus, a qualitative analysis of personnel needs must be made in order to strengthen the institution's ability to achieve its goals and objectives. These data are usually obtained from the appraisal/evaluation of individual staff members.

In general education, where students move from class to class and from teacher to teacher, the qualitative analysis may be made on either a total staff or subject area basis. Because of the nature of vocational education, this analysis should usually be made on the basis of the vocational program to insure that students in the respective vocational programs will be exposed to teachers with the widest breadth of knowledge, skills and attributes possible.

Once this analysis is completed the administration can begin to recruit candidates. Because of the heavy emphasis on practical experience, the sources from which vocational teachers may be recruited differ significantly from the recruitment sources for general education teachers.

The first essential in recruitment is to make as many people as possible aware of the school's vacancies. In the recruitment of vocational teachers, this may be done by a variety of techniques: articles in local newspapers; appearance on local radio and television; informing employees; contacts with advisory committees; listing vacancies with the bureau of employment services and with junior and technical colleges in the area; advertisements in newspapers, particularly large city and military papers; contacting trade and industrial unions, fraternal organizations and local contractors; and announcements in the district's newsletter.

To simplify the task of "getting the word out" some vocational schools have developed a lengthy mailing list which encompasses many of the sources listed above. The wider the search the more successful the district will be in recruiting candidates with the desired competencies and attributes.

TEACHER SCREENING SELECTION AND APPOINTMENT

Boards of education have the legal authority to appoint all employees of the school district. However, boards are dependent on administrators for the management of the recruitment-screening-selection process. Teacher selection is not a policy matter; it is an administrative task. The relationship is recognized in Ohio law. The board of education can take action on the employment or re-employment of professional personnel only upon the recommendation of the superintendent. While a board may reject the recommendation of the superintendent, it cannot employ teachers, principals, directors, and other certified personnel without the recommendation of the superintendent unless it has first rejected two previous recommendations. Even then, there must be a three-fourths majority vote to employ a candidate not so recommended by the superintendent.[4]

In all but very large school systems, superintendents of schools typically are very reluctant to allow the selection of teacher and other certified personnel to be made by other administrators. This is indicative of the importance of the task. Notwithstanding the above, there is increasing evidence that principals, directors and supervisors are becoming involved in teacher selection. Because the director and the supervisor work closely with teachers, it is logical that these administrators be involved in the screening-selection process. However, final selection is not the prerogative of either the supervisors or the director; they merely recommend candidates for consideration to the superintendent.

Because teachers in two-year vocational programs must work together very closely, share laboratories, materials, and equipment, some schools are beginning to involve the remaining teacher(s) in the screening of candidates. Again, the teachers' role must always be advisory.

Basic to the selection of teachers is the ability to predict probable success of candidates. Many approaches have been used to develop predictive criteria. These approaches and a vast amount of research have yielded little evidence that administrators can safely use to identify candidates who will be successful teachers. One reason for this failure is that there has been little agreement on what consitutes "good" teaching. Each administrator and researcher has his/her own definition. Nonetheless, the job of selecting teachers must be done well and administrators must rely on some means as a basis for making decisions.

Certainly a starting point in the selection of staff is the job description and the analysis of the qualitative personnel needs cited above. These documents describe the competencies which candidates need in order to achieve the goals and objectives of the school.

However, these competencies do not generally provide insight into whether or not the candidates can transmit their skills and knowledge to students.

Those who write about improving the school's learning climate and about humanistic educational environment are saying that good teachers possess such qualities as empathy, objectivity, innovativeness, and ability to listen, motivate, and stimulate. They believe in the value of education and they gain satisfaction from the success of their students.

Similarly, the results of the annual public opinion poll of education sponsored by Phi Delta Kappa reveal that the public wants teachers who are concerned about their students, teachers who care about what happens to children and youth.[5]

It is the writer's opinion that good teachers demonstrate that they:

1. Possess a good self-image.
2. Like working with young people.
3. Work hard at being a good teacher.
4. Plan and organize their work.

From the foregoing, it would appear that the selection of teachers has at least two dimensions. The first has to do with knowledge and skills in the subject area, i.e., vocational area—does the candidate possess the technical skills in and knowledge about welding, food service, machine trades, etc. The second dimension consists of those personal traits which will enable the candidate to effectively relate to students.

The vocational director and area supervisor will generally have a greater technical knowledge of the vocational area than will the superintendent. Therefore, they can provide valuable assistance to the superintendent in helping to determine the technical competencies of candidates. They can also assist in evaluating candidates' personal attributes for teaching.

In order to provide the candidates selected for interviews with an equal opportunity to "present themselves" and to insure that the desired information is obtained from each candidate, administrators may develop an interview format which includes a number of simulation type questions—"what would you do if . . . .?" questions. Different simulations dealing with the same general topic could be used by the various

interviewers; in this way the validity of the candidate's responses may be established.

The preceding discussion undoubtedly suggests that the selection of teachers is a difficult and time consuming task. However, when one considers that the learning achievement of 100 to 125 vocational students is directly affected by the teacher selected, and that the district will, on the average, invest $70,000 to $85,000 in each teacher, then the time and energy required by the process may be viewed as well spent if good teachers are the end result.

FULFILLING CERTIFICATION REQUIREMENTS

One means used by the Ohio General Assembly to insure the quality of education in Ohio's schools is through the teacher certification laws. These laws, as set forth in Sections 3319.22 through 3319.31, Ohio Revised Code, spell out the requirements for certificates, the grades and type of certificate to be issued, direct the State Board of Education to establish standards governing the issuance of certificates, and provide for the renewal and the revocation of teaching certificates.[6]

Grades and Types of Certificates. The grades of certificates established by the Ohio General Assembly are: temporary, one year vocational, provisional, professional and permanent. The types of certificates include: kindergarten, primary, elementary, high school, special, elementary principal, high school principal, supervisor, superintendent, vocational, assistant superintendent, pupil-personnel workers, local superintendents, educational administrative specialists and school nurse.

Standard for Certification of Teachers. The State Board of Education has been directed and empowered by the Legislature to establish standards and courses of study for the preparation of teachers, to inspect institutions desiring to prepare teachers, to approve such institutions as maintain satisfactory training programs, and to properly certificate the graduates of such approved courses and institutions. Courses of study for the preparation of teachers together with the standards, rules, and regulations set for each grade and type of certificate and for the renewal and conversion of the various certificates have been adopted and published by the State Board of Education in a publication entitled: *Law and Regulations Governing Teacher Education and Certification.* The publication is available through the State Department of Education.[7]

Issuance of Certificates. Provisional certificates, valid for four years, are issued by the State Department of Education to those persons who have completed the respective courses prescribed by the State Board of Education in an institution approved by the State Board for the type of preparation required. A provisional teaching certificate may also be issued to teachers of vocational agriculture, vocational home economics-job training, and vocational trades and industrial education, who do not hold bachelor's degrees provided that they submit evidence of sixteen (16) semester hours of teacher improvement at a college or university approved for the preparation of teachers in the respective service areas and eighteen (18) months of successful teaching experience in their particular service area.

A provisional vocational teaching certificate issued on the basis of teacher training and a bachelor's degree may be renewed upon evidence of satisfactory character and teaching ability as demonstrated by successful teaching experience within a five-year period immediately preceding the date of application. A holder of a provisional vocational teacher's certificate who has not taught within this period may become eligible for the renewal of the expired certificate by completing 6 semester hours (9 quarter hours) of refresher training pertinent to this field of teaching. A provisional vocational teaching certificate issued to a teacher who does not hold a bachelor's degree, may be renewed upon evidence of 9 semester hours (14 quarter hours) of teaching improvement work, at least one-half of such work to be taken from the vocational courses at a college or university approved for the vocational field requested.

Certification Requirements for Vocational Supervisor. The provisional supervisor's certificate will be issued to the holder of a bachelor's degree with 10 semester hours (15 quarter hours) of course work in one of the occupational service areas from a college or university approved for vocational education including at least one course in coordination and supervision and at least one course in selection and organization of curriculum. The remaining hours are to be selected from the following areas: shop and laboratory design, history of vocational education, shop and laboratory organization and management, education and business and industrial coordination, evaluation techniques for vocational programs, research-problems in vocational education. The applicant must also furnish evidence of 27 months of successful teaching experience in vocational education.[8]

Certification Requirements for Vocational Director. The provisional vocational director's certificate will be issued to the holder of a bachelor's degree with 10 semester hours (15 quarter hours) of course work at a college or university

approved for vocational education including at least one course in vocational organization and administration, at least one course in curriculum design for vocational education, and the remaining hours selected from the following areas: laws and regulations for vocational education, financing for vocational education, educational facilities for vocational education, social and philosophical foundations for vocational education, evaluation techniques for vocational education, research in vocational education, vocational programming for youth and adults with special needs, prevocational programming for youth and adults, organizing adult vocational programs, and psychological foundations. Further, the applicant must submit evidence of 27 months of successful teaching experience in vocational education.[9]

TENURE

Tenure laws were enacted to protect teachers from unreasonable discharge without due process. At times, before tenure laws became common, teachers with several years of experience were dismissed for a variety of reasons that were often either superficially related or totally unrelated to the quality of their performances. Believing this to be both unfair to teachers and to be against the best interest of the public, state legislatures passed tenure laws. As a result of these laws, teachers now enjoy considerable job security. Many critics argue that tenure laws provide life time job security and make schools a haven for incompetency. Advocates of tenure argue that the problem is not with the laws but with the way administrators implement and administer the tenure law. Ohio law defines the reasons for which a teacher may be dismissed as:

1. Gross inefficiency.
2. Immorality.
3. Willful and persistent violation of reasonable regulations of the Board of Education.
4. Other good and just cause.

In the majority of dismissal cases it is incumbent on the school administration to make the charges, collect and document the evidence, provide testimony, and advise the employee of his/her rights.

The administration usually must demonstrate that reasonable effort has been made to help the teacher overcome the problem. With the advent of collective bargaining and the negotiations of employee discipline and discharge clauses, the difference between the rights of probationary and tenured teachers is diminishing. However, it must be pointed out that in the absence of restrictive language in the collective bargaining agreement, boards of education in Ohio do not have to provide due process procedures nor do they have to prove cause in order to non-renew contracts of non-tenured teachers.

The following should be considered minimal requirements of evidence and documentation for dismissal of tenured teachers:

1. Persistent nature of the difficulty. Except in unusual circumstances, it must be proven that the unsatisfactory conduct has been persistent and sustained.
2. Repeated warnings. Administrators must prove that they have warned the employee repeatedly of the nature of the unsatisfactory work or conduct.
3. Frequent assistance. There must be written reports showing that real efforts have been made to help the employee overcome the difficulties.
4. Close supervision. Since the discovery of the difficulties, his work has been closely supervised; the principal or vocational director has personal, first hand knowledge of the employee's failure to improve.

In preparing acceptable evidence, all of the preceding data must be:

1. Specific in nature. General, philosophical statements and charges convey very little weight. Evidence must be factual, must be specific and it must relate directly to the charge(s).
2. Extensive in scope. An isolated rule infraction or incident does not constitute sufficient cause for dismissal except in the most unusual circumstances. A number of instances of any incompetence or defection must be submitted.
3. Recorded. All specific charges must be backed up by written memorandum made by the observer immediately after the observation. Likewise, all occasions when assistance is given and all advisory conferences should be made a part of the written record immediately thereafter. These records should include the date and time, actual length of visit, class and subject taught and other similar data.
4. Original form. Written evidence to support dismissal must be as originally drafted or presented to the employee. Re-writing and re-organization of materials for presentation at a hearing will generally discredit the evidence.

Tenure or its equivalent are needed to prevent the capricious dismissal of staff. However, tenure and clauses in the master agreement should not prohibit the administrator from seeking to dismiss incompetent and inefficient teachers provided the administrator can establish documentary evidence as set forth above.

ORIENTATION OF NEW TEACHERS

New teachers, whether veterans with years of experience in other school systems or beginners fresh from college, find the start in a new teaching position a trying experience. There is so much they do not know about the community, the school plant, the administration, the teachers on the staff, the students, the instructional materials, the operational rules and procedures, and what is expected of them. All new teachers want to be successful. They want to avoid embarrassing mistakes that will make their teaching more difficult. There are many kinds of activities which the school system can carry out which will help the new teachers adjust to their new position. Several of these activities are listed below.

The orientation program for new teachers must be carefully planned and operated for the full school year. The superintendent or his/her designee should begin the orientation with the pre-employment interview and continue through the time of contract approval, to reporting to school, to getting started, and the remaining school year. The building principal, veteran teachers, director of vocational education and supervisors carry the major responsibility for the development and follow-through on the details of the orientation of new teachers. These team personnel must assure the proper orientation of new teachers to students, parents, and citizens of the community as well as the total staff of teachers. Activities in the orientation program are endless and varied. The activities selected must be appropriate to the local situation and to the means existing for providing such help. Timing of the activities must be dictated by the immediacy of need. Activities are grouped below generally under the types of help new teachers say they need. They are not listed in any particular order as to timing.

Orientation to Teaching Assignment

- The administrator handling the employment contract should take time for a complete discussion of the job during the employment interview.
- Full explanation of salary, certification, fringe benefits, assignment, and other terms of employment should be provided at contract time.
- At the contract time the new teacher should be provided a handbook that discusses the goals and objectives of the school system, the general nature of the local community and school district, and lists suggestions to ease the transition into the school system.
- There should be a review of regulations governing the rights, responsibilities, and privileges of new teachers.
- The central administrator in charge of personnel should arrange an interview for the new teacher with the principal and/or director of vocational education. In this interview the new teacher's assignment (both teaching and extra curricular) should be expiained. At the same time there should be a tour of the building and the teacher's classroom. In addition the teacher's manual should also be provided.
- The new teacher should be given the course of study or curriculum guide, textbooks, and supplemental teaching materials for each assignment.
- There should be a scheduling of conferences with supervisors prior to the opening of school.
- The principal or director of vocational education should assign a compatible experienced teacher from the school staff as a colleague or personal counselor and advisor to the new teacher for the school year.

Orientation to the Community

- Upon employment, the new teacher should be given a packet of descriptive information about the community which may include housing and shopping information, maps, brochures, announcements, and other community-related materials.
- Enlist the help of community organizations to arrange special events for introducing the new teachers.
- Arrangements should be made to take the new teachers on a visitation trip of the community. This trip should acquaint these new personnel with local business, industry, civic institutions, social agencies, churches, and cultural, recreational, and educational facilities.

Job Orientation and Induction

- One full week of varied inservice programming should be sponsored for new teachers immediately before school opens. This time may best be used by structuring morning inservice sessions with the new teachers and having the afternoons free to do organizational planning in their respective classrooms. During this week items such as the following could be discussed: school rules and regulations and board of education policies, records and reports, classroom organization and management, locating sources of instructional materials, student evaluations, professional library, grading and reporting system resources, student personnel services, audio-visual resources, curriculum development and lesson plans, clerical and custodial duties, teaching methods and

stategies, testing, homework, cumulative records, community resources, and relations with parents and the community.

- The teacher's colleague or "buddy" should be expected to be an advisor/helper throughout the whole school year but particularly during the opening months of the school year.
- The principal, director of vocational education, and supervisors should make periodic classroom visitations with new teachers throughout the school year and hold follow-up conferences.
- The principal, director of vocational education, and/or supervisors should hold monthly meetings with new teachers to discuss any problems or concerns.
- New teachers should have opportunities to observe the instruction of veteran successful teachers in their school and/or in other schools.
- Special inservice programs should be provided new teachers during the school year to strengthen their knowledge of the curriculum content and instructional strategies.
- New teachers should be encouraged to participate in professional organizations, attend professional meetings, and involve themselves in a self-renewal program of physical, social, and intellectual growth.
- Finally, new teachers should be asked to evaluate their orientation program and make suggestions for its improvement, and volunteer to help plan the following year's program.

During this first year the new teacher will find the following topics of prime importance:

1. Learning the curriculum.
2. Making lesson plans.
3. Attending faculty meetings.
4. Attending workshops.
5. Community relations.
6. Child/youth growth development.
7. Evaluating student achievement.
8. Evaluating one's goals and progress.

The major purpose of orientation for new teachers is to increase their teaching proficiency, to help them be successful, and to maintain high morale. If administrators, supervisors and experienced teachers will collaborate as team members in fulfilling the varied activities described here, this major purpose will become a reality. New teachers and students will profit from the success reaped from the comprehensive and thorough orientation program.

STAFF DEVELOPMENT

Staff development consists of all the experiences provided by schools which contribute to the personal and professional growth or continuing education of employees of the school. The purpose of these experiences should be to make employees more competent and proficient in doing their work in schools.

Currently, three reasons exist for increased emphasis on staff development: (1) the declining birthrate and resultant decline in teacher turnover, (2) public dissatisfaction with the achievement of many students, and (3) general societal pressures that impinge on the schools. Staff development, under the title of "inservice education" has existed ever since teachers entered the profession with their normal training certificates. For years, teachers were better educated than the general population and therefore an annual institute or convention was generally considered as sufficient to keep teachers informed and up to date about new developments in education. The world and the curricula changed little. Therefore, once demonstrating reasonable effectiveness, teachers were granted permanent teaching certificates which licensed them for teaching for life.[11]

However, in recent decades our world and the educational system has become very complex. More changes take place now in our world in one decade than happened in the total century of the 1800's. These changes have resulted in educational policy makers requiring continued professional training for new or renewed certification. Salary schedules have been developed and implemented which have reflected concern for continuous professional education. Today, staff development has very broad implications. Interest is generating from all levels: local, state, and national and from a broad spectrum of institutions and organizations, e.g. local schools, school districts, state department of education, U.S. Office of Education, colleges and universities, National Education Association and its state counterparts, professional organizations such as the National Association of Supervision and Curriculum Development and its state counterparts, and American Vocational Association.

The most obvious trend in staff development is the rapidly growing influences at the local school district level. During the past decade the focus of control has moved rapidly from institutions of higher education to local school districts, and even from the school district to the local school where principals are providing more and more leadership for staff development.[12]

Along with this shift in control is a tendency to use members of the active teaching staff to instruct and assist their colleagues rather than rely on colleges and universities for expertise. Teachers believe that practicality and credibility are more easily assured if a local practitioner conducts the staff development activity. Now that preservice education credit hour wells are drying up, universi-

ties are making a concerted effort to become effective in the inservice arena. The university influence continues to be strong for teachers who enroll in graduate programs through the master's degree level or even a higher specialist degree.[13]

A variety of means is employed in school systems to provide staff development. They include: conferences, institutes, workshops, seminars, faculty meetings, extension classes, curriculum project work, correspondence courses, study groups of various kinds, research and experimentation, graduate work, sabbatical leaves devoted to special projects, visitations to other schools and classrooms, public service, and just plain professional reading of good books and periodicals.

Staff development activities should deal primarily with instructional problems and topics of most interest to teachers. An effective way to ascertain teacher inservice educational interests is for the school district to conduct an assessment survey of teacher opinions. Supervisory leaders and teachers should work together in planning the survey. One way to do this is to have all faculty personnel submit possible inservice education topics and then have a committee including supervisory personnel and a cross section of teachers cull down and summarize the list into those items representing problems or topics of system-wide interest. Next this summarized list can be issued to all teachers and have them rate them on a rating scale degree of interest. The scale might be from a (1) through a (5) with the "1" designation representing very low interest and the "5" representing a very high interest.

A sampling of possible topics which might be rated is provided below:

	Degree of Interest				
	Very Low	Low	Average	High	Very High
Methods of Motivating Students	____	____	____	____	____
Behavioral Modification	____	____	____	____	____
Individualizing Instruction	____	____	____	____	____
Constructing and Using Diagnostic Tests	____	____	____	____	____
Work-Study Programs	____	____	____	____	____
Using Performance Objectives	____	____	____	____	____
Teaching Reading Skills	____	____	____	____	____
Teaching Written Communication	____	____	____	____	____
Conducting Parent-Teacher Conferences	____	____	____	____	____
Child Development	____	____	____	____	____
Preparation of Resource Units	____	____	____	____	____
Curriculum Revision	____	____	____	____	____

Effective staff development programs require the presence of a number of conditions and principles. Dillon has suggested 10 such principles and conditions.[14]
Staff development should:

1. Relate to the goals of the district and to the translation of those goals into improved student achievement.
2. Evolve from diagnosis of district, building, and individual needs followed by design and delivery of programs to meet identified needs and evaluated by reference to stated objectives.
3. Provide continuous staff development for all levels of professional staff, including administrators.
4. Relate to goal-setting by individual staff members with appraisal in terms of accomplishment of stated self-improvement projects.
5. Concentrate on changes in both subject matter and methodology.
6. Utilize the "multiplication principle" of recognizing staff members who are competent—or training staff members for competence—in specific skills so that they, in turn, can train others.
7. Relate theory and application in such a way as to result in measurable change in staff behavior and be spread over a long enough period of time to insure that changes in behavior are relatively permanent.
8. Provide continuation of preservice training as the beginning of a continuum of development which is the joint responsibility of the local school district and institutions of higher education.
9. Provide activities which are well-planned and well-executed for maximum benefits to staff members and to students.
10. Actively initiate effective change within the school or school district.

Well-designed and executed staff development programs should leave an impact on students and teachers. Learning should become more exciting and significant for students. The staff development program should result in new teaching competencies and broader and deeper up-to-date knowledge of education and instructional skills. It should cultivate a spirit of free exchange of ideas and general team communicational feeling among teachers on a school staff.

LEADERSHIP ACTIONS PROMOTING STAFF MORALE AND MOTIVATION

Several contemporary organizational theorists have suggested that an organizational climate characterized by high trust stimulates high performance. Although there is not always a direct relationship between job satisfaction and job performance, greater productivity usually results when an organizational climate of dependence, submissiveness, conformity and imposed evaluation gives way to relationships which foster trust, independence of action, risk-taking and self-evaluation.[16] Thus, teacher morale and motivation would seem to have direct impact on student learning and achievement. One of the major thrusts of a school administrator, therefore, may very well be to direct his/her efforts toward developing high teacher morale and motivation.

The morale of an organization may be defined as the willingness of its members to work together to achieve the organizational goals. If both teachers and students are highly motivated to achieve effective student learning, the morale of the school will be high. Both will seek to achieve their best performance; both will be obtaining satisfaction from this performance and consequently the morale of the organization will be high.[17]

Because the administrator must work to assist each staff member to achieve a high degree of motivation, it is important that there be some understanding of human motivation.

Motivation is said to be the directing of behavior toward satisfying a particular need. Fairly consistent patterns of behavior are called motives. To understand motivation, then, one must consider what it is most people strive to achieve—what it is they need.[18]

Maslow has proposed a hierarchy of human needs beginning with basic physiological needs and culminating in higher social and ego needs. Maslow has defined human needs as:[19]

1. Physiological Needs - need for food, shelter, clothing.
2. Social Needs - need for belonging, for association, acceptance, giving and receiving friendship and love.
3. Ego Needs - a. needs for self-esteem, self confidence, achievement.
   b. need for status, recognition, appreciation, respect, power.
4. Self Fulfillment Needs - need for realization of one's full potential, being creative, continued self-development, self actualization.

In general, students of Maslow's theory have concluded that most organizations, including educational institutions seldom provide for the needs of employees beyond the social needs level. According to Maslow, once the physiological

needs are satisfied, the higher level needs become operative. Further, once a need is satisfied it is no longer a motivator.[20]

In examining the implication of Maslow's theory as a means for the vocational directors to develop morale and motivation, it is helpful to group needs into two categories: lower-order (security, social and to some extent, esteem or ego) and higher-order (esteem or ego, autonomy and self actualization).

The school provides money, benefits, position, friendship, protection and the like in exchange for teachers agreeing to be employed. Teachers feel entitled to have these lower-order needs met. Therefore, the lower-order needs provide little opportunity for the administrator to generate any great degree of motivation.[21]

Teachers exchange service to the school and its students for fullfilment of the higher-order needs. However, it must be kept in mind that lower-order needs must be satisfied before higher-order needs can work as motivators.

Higher-order needs have been studied extensively in order to better understand how the motivation of teachers might be increased. Four needs have received particular attention: affiliation, achievement, status/power and self actualization.

Affiliation: Much human effort is directed toward satisfying the need for affiliation, a social need. Because at least half of a worker's waking hours are spent at work, it is obvious that the work environment must satisfy in some degree the need for affiliation. Because teachers spend the major part of their work day isolated from other adults, and because students do not always contribute to a sense of friendship and warmth, it is important that administrators encourage an atmosphere of warmth and friendship. They can do this by offering their own sincere friendship, by promoting positive interactions among staff and by encouraging and promoting social events. The following are points to consider in attempting to help staff meet needs for affiliation:

Be available to staff.
Offer friendship to staff.
Be interested in staff as individuals.
Demonstrate this interest to them.
Encourage staff social events.
Participate in staff social events.

As an added footnote to the discussion on the need for affiliation, Sergiovonni and Stewart have pointed out that management, fearing group hostility to its own objectives, often goes to considerable length to discourage efforts of employees to develop affiliation; i.e., groups. Studies have indicated that the tightly knit, cohesive group may, under proper conditions, be far more effective than a separate number of individuals in achieving organizational goals.[22]

Achievement: When people spend time thinking about doing a better job accomplishing something unusual and important, or advancing their careers, they are showing a need for achievement. The stronger the achievement drive the greater the probability that the individual will demand more of himself. Perhaps the most fascinating aspect of the achievement motive is that accomplishment seems to be an end in itself. On the other hand, those who lack a need for achievement usually expect a tangible reward for greater effort. The behavior pattern of those with high need for achievement may be described as 1) taking risks as a function of skill rather than chance; 2) accept individual responsibility and is accountable for behavior; 3) needs knowledge of results, or money as a measure of success; 4) energetic; 5) anticipate future possibilities.[23]

It is important to note that if those with high achievement needs cannot fulfill their needs positively within the structure of the organization, they will then express their needs in a negative fashion within the organization, or through activities in teacher organizations and/or other institutions. Motivation through the need to achieve will come about when the teacher is given a significant responsibility and is successful in that responsibility. The responsibility must be challenging; little satisfaction will be derived from tasks which are easy or routine.

Teachers with a strong concern about achievement want concrete feedback on how well they are doing. The feedback must be frequent and immediate; it should be specific, understandable, and positive.

Thus, the achievement need is indicated by someone wanting to perform better. It may be demonstrated by the person seeking to outperform someone else, by meeting or surpassing some self-imposed standard of excellence, by doing something unique, or by striving to advance in one's career. In light of the foregoing, administrators may need to ask themselves the following questions:[24]

Do I give personal responsibility to individual teachers?
Is that responsibility clearly defined and challenging?
Will a teacher get due reward for success in that responsibility?
Is the responsibility within a teacher's capabilities but also challenging to him/her?
Would a teacher feel increased achievement participating in professional development experience?

Power and Status: When people seek to have an impact on others, they are said to be motivated by a

need for power. This need may be expressed as aggression or it may be demonstrated in giving help, assistance, advice and support. Teaching can very easily become authoritarian in nature if the teacher has no other outlet to fulfill the need for power and status. This condition usually occurs when the teachers believe that they have no influence, no power or status or no real input into the decision making process. Advisory committees, study groups and curriculum committees, etc. are useful organizational tools the administrator can use to channel this need in a positive direction. Seeking the advice and input of individual teachers on matters which directly relate to their work are also helpful.

Self-Actualization: According to Maslow, self-actualization is a person's desire to become a complete, autonomous individual. The need for autonomy involves developing one's abilities to the fullest, to become all that one's potential will allow. Self-control, self-determination, and self-government are expressions of this need. This autonomy stems from three basic characteristics found in the self-actualized person:[25]

1. Self-actualized people see themselves in a positive way; they have a high degree of self-esteem. Thus, they do not have a need to publicize, prove or justify themselves.
2. Self-actualized people tend to be open to experience; they are not afraid of failure; they are open to exploring new ideas, new methods, and will not be afraid of change.
3. Self-actualized people tend to get involved, to be committed, to be identified with whatever he or she does. The risk of commitment can be rewarding and successful.

If teachers encounter supervisors that are encouraging, sympathetic and rewarding, then their attitudes toward, and commitments to teaching are more likely to be positive and confident. It is important that beginning teachers receive positive and encouraging reinforcement for his/her efforts from the administrator. Teachers will be committed to teaching if they learn early in their careers that commitment to teaching is appreciated and rewarded by their administrator.

In order to effectively use Maslow's hierarchical needs concepts as a means of motivating the teaching staff, it must be recognized that there are several different aspects to human motivation.[26]

1. Human motives tend to be unique to the individual. The strength of the teacher's needs and their reaction to success and failure will differ markedly. Administrators must be aware of individual differences in needs of the members of the teaching staff. Because effective administration is complex and because of the complex nature of human behavior, there is no single administrative/supervisory style that will lead to optimum efforts of all teachers.
2. Human motives vary in strength. The stronger motives will be the determinate of behavior until they have been sufficiently satisfied to allow a weaker motive to operate.
3. Some motives tend to be persistent while others are easily satisfied. Some motives seem to dominate an individual's behavior no matter how successful the goal of the motive is achieved. Witness the teacher who must be constantly reassured that their performance is very satisfactory.
4. Motives are not only unique to an individual, but the satisfaction of a motive is also unique to the individual. What satisfies a motive for one person may not satisfy the same motive in another person.
5. Motives are often hard to identify because individuals often hide the real reason for their behavior behind a more acceptable motive.

A final point about motivation and morale: An administrator must be close enough to individual members of the staff for them to feel confident about and comfortable with showing their personal attitudes and feelings. However, it is not uncommon for administrators to protect themselves against this level of relationship with their staff out of fear of the demands that the close relationships might later make upon them. Said another way, administrators often feel that they must maintain a distance between the staff and themselves in order that proper employee discipline be maintained. This position ignores a very important motivating factor—the inherent human desire to please others who are meaningful and important to us.

RELATIONS WITH TEACHER ORGANIZATIONS

The vocational director and supervisors are key persons responsible for implementing the policies of the board of education with regard to vocational education. They deal more directly with vocational education than does any other administrator. In the area of collective bargaining they represent the school district's employee relations and personnel policies to the vocational teachers and the teachers' union representatives; i.e. building representative, departmental representative or union steward. The director and supervisor interpret and apply the provisions of the collective bargaining agreement and board policies to specific work situations. Therefore, it is essential that they understand the basic elements of employee relations and contract administration, as well as the specific provisions of the board's personnel policies and negotiated agreement.

The concept of "good faith" is applicable not only to the process of contract negotiations, but to the entire spectrum of employee relations activity. The good faith concept is particularly important to the relationship between the director and the union representative.

Just as the director and supervisors are responsible for administering the negotiated agreement and board personnel policies within the vocational department or school, the union representative has responsibility to police the contract and personnel policies. These adversarial positions may result in conflict and hostility unless the director and the union representative can understand and appreciate the role each has to play in the total employee relations process.

The union representative should be recognized as the individual selected by the union for a position of trust and responsibility, for performing many important functions. In addition to policing the negotiated agreement, an effective union representative: 1) represents employees in the bargaining unit; 2) recruits new members; 3) serves as a communication link between the union and the school administration; 5) interprets the contract to employees; and 6) generally represents the union.

It is essential that the director understand how the union representative is selected, either elected or appointed, in order to better understand the political pressure under which the representative operates. The director should also realize that the representative, for political reasons, must occasionally take positions with which he/she does not personally agree, just as the director may at times be required to enforce unpopular management decisions. An atmosphere of mutual trust and understanding between the director and the union representatives is essential if these and similar adversarial situations are to be resolved in an amicable manner.

Similarly, union representatives should realize that the director and supervisor have responsibility to assure the achievement of the school's goals and objectives, and that they expect support from the union representative in getting a "fair day's work for a fair day's pay."

It is also important that the director keep in mind that when representing an employee or when speaking for the union, the union representative has equal standing with the director and other administrators, and should be treated accordingly. When ***not*** serving in this representorial capacity, the union representative should be accorded the same treatment as other staff members.

The union representative will usually represent teachers in handling of grievances. These situations may require, for political reasons, that the union representative attack the administration. The director should be sensitive to when these attacks are "window dressing" and when the attacks represent a real concern. Further, the right of the representative to have access to and time with the staff for the preparation of a grievance hearing is often a source of irritation and conflict. Hopefully, this will be spelled out in the negotiated agreement or worked out with higher level administrators so as to minimize conflict at the operational level.

In some instances where the employee relations climate within the district or a school is strained or even hostile, the union leadership will attempt to gain advantages through policing the current agreement that were not possible to gain in contract negotiations. In order that the vocational director does not unknowingly relinquish some management prerogative, it is imperative that the director and other mid-management personnel be thoroughly familiar with all aspects of the contract and the negotiations process.

To adequately administer the contract, the director must understand the meaning and intent of the provisions to which both parties have agreed. The understanding of this intent and meaning is enhanced if he/she has an opportunity to review the various proposals and counter proposals made by both sides during the contract negotiations.

In addition, it is quite likely that the union

representatives will have participated in training sessions in the general administration of collective bargaining agreements. They will be familiar with all aspects of board policies and will have been schooled in both the short and long term goals of both the local and state/national unions. Therefore, if the director is to adequately represent the school district and to carry out responsibilities for achieving the district's goals and objectives, he/she needs training in the collective bargaining process as well as a thorough understanding of the negotiated agreement.

As a final word, it must be foremost in the director's mind that he/she is a member of the school district's management team, that loyalty belongs with the organization served, and that every effort must be directed toward accurately and fairly administering the school system within the framework of board policies and the negotiated agreement to achieve the goals and objectives of the school.

EVALUATION OF TEACHER EFFECTIVENESS

One of the outcomes of the public's recent demands for more accountability by school boards and educators has been a close examination of the process used to evaluate and appraise teachers' performance. Both the purposes and methods of evaluation are being examined.

Educators including both administrators and teachers view the purpose of evaluation to be the improvement of instruction. Evaluation is viewed as one of the steps in the process of supervising instruction. This philosophy says that the performance of the teachers is evaluated to determine strengths and weaknesses; the strengths are accentuated and help is directed toward reducing and/or eliminating the weaknesses. The public, including many members of boards of education, on the other hand, argue that the purpose of evaluation should be to weed out incompetent or ineffective teachers. The public is also demanding that students' achievement be included as a factor in the evaluation process.

The frequency, methods and content of teachers' evaluation would indicate that educators give little more than lip service to the philosophy that the purpose of evaluation is to improve instruction. A 1973 study involving a stratified sample of 155 school systems conducted by Educational Research Service reveals that slightly over fifty percent of the sample school districts evaluate probationary teachers only one time per year; and almost fifty percent of the sample districts evaluate tenured teachers once every two years or less. Further, eighty-one percent used either an evaluation check list or a combination checklist and self-evaluation as the evaluation instrument.[27]

Undoubtedly the reason that more is not done to improve instruction through teacher evaluation is that effective teaching, contrary to measuring effectiveness in other fields, is difficult to measure. There are several reasons why this is true: teaching outcomes are difficult to assess, outcomes of teaching are latent, there is no real consensus on the desired product of education and there is no general agreement on the procedures to be used in evaluating teaching performance.

Teachers generally object to evaluations. They contend that most evaluation instruments are ambiguous and vague and that the items have little to do with student learnings. Aside from these complaints, there are at least two major weaknesses to the instruments usually used to evaluate teachers :

Teacher behavior varies significantly during an observation because of the presence of the appraiser in the room. Thus, the reliability of the observation is open to question.
The sample of teacher behavior, one to three or four observations per year, cannot take into account the ups and downs in the teacher's performance, and prevents adequate sampling of many relevant teaching skills.

Research findings and opinions of authorities in personnel administration and psychology have stressed that the involvement of teachers in the identification of standards of behavior against which teachers are to be measured is essential to the success of any appraisal program. Self-evaluation and mutual identification of goals and objectives, as noted earlier, will be far more effective in improving instructional performance, in motivating teachers and in building staff morale than will the use of rating scales and other subjective devices.

Notwithstanding the above, a new trend has develo[illegible] in the evaluation of teaching [illegible]ormance. This trend is based on sound principles of teaching, learning psychology, developmental psychology and educational measurement. The essential ingredients of this process are outlined below:

- Teachers, principals and other administrators work cooperatively to identify teaching behaviors, which they believe to be directly related to student achievement.
- Utilizing these behaviors individual teachers do a self-appraisal.
- The principal or appraiser reviews the self-appraisal with the teacher and agrees on a number of behaviors on which the teacher will attempt to improve during the year.
- The teacher and principal periodically review the progress which the teacher is making.
- A final review is conducted at the end of the year to determine progress and set goals for the next year.

In utilizing this process Bogue and Sounders stress that the process should:[28]

1. Be based on a rational, well-thought-out concept of performance effectiveness rather than an assortment of truisms and conventional wisdoms.
2. Have a good research base: that is, utilize those findings from research conducted locally and elsewhere which describe the values certain performances have over others.
3. Include in their development all groups and agencies who will be significantly involved in both the outcomes of the process and the responsibility for making decisions which are related to such findings (tenure, promotion, salary, assignment).
4. Emphasize "measurable" expectations as opposed to nebulous cliches. For example, the expectation that a teacher will make "daily instructional plans" lends itself to measurement much more realistically than does the expectation that he will "maintain good classroom atmosphere."
5. Emphasize those performances which research has indicated correlate closely with effective performance as opposed to vague, unproven generalities. For example, if an organization values the questioning technique whereby a teacher is expected to move students from the level of memory to evaluation, observations can be made by competent persons to determine a teacher's skill in this regard with much more certainty than by observing his "classroom atmosphere."
6. Reflect, philosophically and operationally, that evaluation is a continuous process. Many currently used systems require only "one shot" evaluation, such as at the end of a probationary period when a teacher is being considered for tenure, or each spring when salary adjustments and promotions are being considered.
7. Avoid the obvious but nonetheless frequently found pitfalls which sabotage the effective implementation of otherwise sound programs.
   a. The person being evaluated has little or no involvement in the process.
   b. Those conducting the evaluation are often not in a position to accurately do the evaluation.

Researchers at Battelle Memorial Institute have developed similar guidelines.[29]

1. Standards of effective teaching should be stated in behavioral terms which can be measured.
2. Standards of effective teaching should be based on sound principles derived from teachers themselves, learning psychology, developmental psychology and educational measurement.
3. Observational rating systems cannot provide a large enough sample of teacher performance to support a valid appraisal of the effectiveness of the teacher.
4. Teacher self-appraisal should be the major source for identifying performance areas in need of improvement.
5. Provisions should be made whereby the administrator can identify performance areas in need of improvement.
6. The system should be designed to encourage a close working relationship between the teacher and the appraiser. Attention of both parties must be focused on performance not on the teacher's personality. (It is assumed that a greater sense of personal attainment and higher morale will prevail when the two engage in face to face communications, sharing decision making and solving problems.)
7. There should be mutual agreements on the final selection of goals or job targets for the teacher.
8. The system should provide for continuous analysis of the teacher's progress.
9. The system should permit gathering information through classroom observation for interim conferences when such will shed light on teacher progress.
10. The system should emphasize the teacher's responsibility to account for progress related to the attainment of goals.
11. The end of the year conference should be used to determine the extent of the teacher's progress toward the achievement of the established goals; the conference should also be used to establish tentative goals for the following year.

It is the writer's point of view that there is a moral, if not legal obligation to provide probationary teachers the same degree of due process for dismissal that would be provided tenured teachers. Further, the administrator in the writer's

opinion is morally obligated to establish the same degree of just cause for dismissal. The identification of standards of teacher performance and setting of job targets or goals as inferred from the guidelines above, if faithfully implemented and executed, would produce the documentation needed to provide due process and establish just cause.

DIRECTOR'S ROLE IN SALARIES, SALARY SCHEDULES AND FRINGE BENEFITS

Problems centering around staff compensation have become more visible as a result of collective bargaining, strikes, and "chalkboard blahs." The day has long paseed when it was beneath the professional dignity of a teacher or administrator to be concerned about salaries and fringe benefits.

Salary schedules are important factors in recruiting and retaining vocational teachers. Not only must salaries in vocational schools be competitive with neighboring districts, but they must also be competitive with business and industries from which a large proportion of the vocational staff is recruited.

While the director is not responsible for developing and establishing schedules and fringe benefits, he/she can provide the superintendent with valuable information and insight. For example, the director should also be attuned to the thoughts of the staff relating to these matters. These two pieces of information will be most helpful to the superintendent as he plans the district's fiscal management. As a resource person, the director may assist in providing answers to such questions as:

1. What impact does this salary schedule and fringe benefit plan have on staff morale, staff recruitment and staff retention?
2. Is the salary schedule fair to all groups—beginning teachers, older teachers? If not, why?
3. Does the compensation plan encourage and promote staff development?
4. What problems have been reported in the administration of the salary schedule?
5. Are there fringe benefits not now provided to staff that would be highly beneficial to install?

The director can assume responsibility for keeping employees informed about the district's benefits program. As a part of this responsibility, the director may assist employees in securing appropriate forms and advising them as to their options. Similarly, the director should interpret the provisions of the districts salary program to staff.

There are several issues pertaining to the administration of the salary schedule which are unique to vocational teachers. Some of these issues are:

1. How many years of teaching experience will be credited to teachers who have retired from the military?
2. How many months of military service will constitute a year of teaching experience?
3. How will training credit be determined for teachers with experience in the trades but no formal post-secondary education?
4. Will vocational work experience be credited as teaching experience? If so, on what basis?
5. How will the amount of previous teaching be determined for teachers with previous teaching experience?

The director can greatly assist in keeping employees informed about the policies for implementing the salary schedule and can take responsibility for informing employees about and helping them with the district's fringe benefits program.

DIRECTOR'S ROLE IN CONTRACT ADMINISTRATION
(Continuing and Limited)

The powers of a board of education to contract with its teachers is expressly granted by statutes. In addition, the courts have ruled that boards of education have those implied powers which are necessary to accomplish and carry out the expressed powers. That is, the breadth of powers implied from the statutes in establishing a board's contractual relationship with its teachers are limited by the duties and responsibilities imposed on the board by law.[32]

Some of the requirements of law concerning teacher contracts are delineated below:

1. Boards of Education of city, exempted village or joint vocational school districts can employ and re-employ teachers only upon the recommendation of the superintendent of schools.
2. Written contracts for employment and re-employment are required.

3. Failure on the part of the board of education to execute a contract does not void the employment contract.
4. A teacher is presumed re-employed in the absence of a superintendent's recommendation, notice by the board of education or a written contract.
5. Teacher contracts are of two kinds: continuing (tenure) and limited (probationary).
6. A contract issued for supplemental duties is considered a limited contract, even though the teacher may have a continuing contract covering his/her regular duties.
7. A teaching contract for the father, brother, mother or sister of a member of the board of education is void if the member votes for or participates in the making of the contract.

Continuing Contracts. The holder of a continuing contract has continuing contract service status or tenure. Once a teacher is granted a continuing contract, that contract remains in effect until the teacher resigns, elects to retire or is retired because of age, or is terminated.

The board of education, acting on the recommendation of a city, exempted village, or joint vocational school district superintendent must grant eligible teachers continuing contracts unless at least three-fourths of the members of the full board vote to reject the recommendations. Such rejection must take place and notification given to the teacher on or before April 30.

To be eligible for a continuing contract, the teacher must satisfy statutory requirements with respect to certification and length of service. Only teachers holding professional, permanent or life certificates meet the certification requirements. With respect to length of service, a teacher must have taught in the district for at least three years within the last five years, or must have served two years in the district if continuing contract status has been attained elsewhere. In the latter situation, the board of education, upon recommendation by the superintendent, may at the time of initial employment, or at any time within the two-year period declare a teacher to be eligible for a continuing contract.

Limited Contracts. The statutes of the state of Ohio require that boards of education enter into limited contracts with each teacher employed by their board who holds a provisional or temporary certificate. A limited contract may be issued for a period of from one to five years. A teacher employed under a limited contract can be re-employed at the expiration of the contract unless the board, acting on the recommendation of the superintendent, gives the teacher a written notice of its intention not to re-employ. Notice must given on or before April 30.

It should be noted that Ohio law does not require that a board of education provide a teacher on limited contract status with reasons for the board's decision not to re-employ. However, Ohio's "Sunshine Law" would seem to require that the teacher be given prior notice if the board of education intends to discuss the teacher in executive session. The teacher may require that the discussion take place in open meeting.

Termination for Cause. In Ohio, teacher contracts may be terminated for the following reasons:

1. Gross inefficiency.
2. Immorality.
3. Willful and persistent violation of reasonable regulations of the board of education.
4. Other good and just cause.

A teacher, whether on a limited or continuous contract, may not be terminated for engaging in conduct which is protected by the First Amendment of the Constitution. However, in proving that the teacher's conduct was constitutionally protected it must not only be established that the conduct is constitutionally protected but also that such conduct was a substantiating and motivating factor in the dismissal.

In order to justify termination for gross inefficiency, one court has held that the teacher's inefficiency must be flagrant, extreme and complete.

Where other good and just cause may be a basis for termination, such cause must be similar in nature and seriousness to gross inefficiency or to willful and persistent violations of reasonable regulations.

As noted in the tenure section above, that neither tenure laws nor collective bargaining agreements should prohibit administrations from seeking to dismiss incompetent and inefficient teachers. It is incumbent upon the administration to prove and document through proper evaluation that just cause exists for dismissal.

Procedures for Termination. Procedures for the termination of teachers in Ohio are set forth in Section 3319.16 and 3319.161 of the Ohio Revised Code. These provisions require that:

> Before terminating a teacher's contract, the employing board must furnish the teacher with a written notice of its intention to consider the termination of such contract. The notice shall include full specification of the grounds upon which the board intends to consider termination.

Within ten days after a teacher has received such notice, the teacher may file with the treasurer of the board a written demand for a hearing before either the board or a referee. The board shall schedule the hearing to be held within thirty days from the receipt of the written demand, and the treasurer shall give the teacher at least twenty days' notice in writing of the time and place of such hearing. No hearing shall be held during summer vacation without the teacher's consent.

A termination hearing shall be private unless the teacher requests a public hearing. Both parties may be present at such hearing, be represented by counsel, require witnesses to be under oath, cross-examine witnesses, and require the presence of witnesses in their behalf upon subpoena to be issued by the treasurer of the board. The board of education shall provide for a complete stenographic record of the proceedings, a copy of which must be furnished to the teacher.

Where the hearing takes place before a referee, the board, by majority vote, may accept or reject the referee's recommendation on the termination of the teacher's contract. After a hearing before the board of education, the board, by majority vote, may enter its termination upon its minutes. A board's order to terminate a contract shall state the grounds for such termination.

A teacher affected by an order of termination may appeal to the court of common pleas for a final factual determination of the matter. While not authorizing a trial *de novo*, the common pleas court is directed by law to examine the transcript and record of the hearings and to hold such additional hearings as it deems advisable, at which it may consider other evidence in addition to the hearing transcript and record. The court may reverse an order of the board of education terminating a teacher's contract, where it finds that such order is not supported by, or is against, the weight of the evidence.[31]

DIRECTOR'S ROLE IN HANDLING GRIEVANCES

The way people work together in an organization is of critical importance to the effectiveness of the organization. Beginning with the Western Electric Company's Hawthorne study, it has consistently been demonstrated that efficient production is geared to good employee morale. However, in every employment relationship grievances and dissatisfactions arise.

The causes of many grievances and dissatisfactions are often either imagined or inconsequential. A lack of means for the employee to express dissatisfaction or a grievance may lead to far more serious problems. Some grievances, of course, may be of a serious nature and involve a large segment of the school staff. There is an organizational need for a vehicle through which employees can present to the administration their suggestions, concerns, dissatisfactions and grievances. With the advent of collective bargaining in public education the vehicle has more often than not taken the form of a grievance procedure.

The causes of grievances and complaints can usually be classified into one of three general headings:

1. Poor communication.
2. Different frame of reference.
3. Self-interest.

Grievances usually arise from one of three following sources:

The Job. Such factors as wage inequities, poor working conditions, level of work is too hard, or too lazy, production is too high, promotional opportunities are limited, etc., give rise to the filing of grievances.

The Employee. Often factors stemming directly from the grievant may be the specific source of the grievance. These factors may include such factors as: underqualified or over qualified, emotionally unstable, family troubles, poor health, cultural background, uncooperative and/or antagonistic attitude, etc.

The Supervisor. Probably more grievances are generated by stress between the employee and the supervisor than any other source. This is particularly true when the two parties have negotiated a collective bargaining agreement amicably.

The sources of grievances stemming from the supervisor include: inconsistency, arbitrariness, favoritism, failure to listen, discrimination based on race, sex, cultural background, inability to train, hasty decisions without full facts, sudden changes without reason, failure to promote because does not wish to lose good man.

A supervisor who is sensitive to his employees can often detect when something is bothering the employees under his supervision. The employees demonstrate such things as lack of interest in their work, they become antagonistic toward the supervisor and each other, tardiness and absenteeism increase, rules and regulations are disregarded and poor work performance is generally evident.

Effective administration can reduce the seriousness of many grievances and prevent many others by:

1. Being approachable, friendly and open with staff.
2. Maintaining effective personal contacts with each employee.
3. Being consistent in applying the rules and regulations.
4. Complimenting staff for good work.
5. Treating employees with respect and dignity.
6. Treating employees equally.
7. Being alert to minor complaints and sources of irritations.
8. Avoiding arbitrary and capricious orders.
9. Being alert to changes in attitudes and/or behaviors.
10. Giving directions in normal tone of voice without being demanding or irritating.

Depending on the collective bargaining agreement, the director will probably hear grievances at either the first or second step of the grievance procedure.

The following is presented as a guide in hearing and responding to grievances:

- Do not interrupt employee statement of his grievance or complaint.
- Listen carefully with intent to understand.
- Listen with an open mind—the employee may be right.
- Obtain all the facts; get at the real cause of the grievance.
- Evaluate all the facts objectively and impersonally.
- Do not make a hasty decision or make a decision when you are irritated.
- Give reasons for your decision.
- Be sure your decision is consistent with prior decisions.
- Consult with others when possible.
- Keep an accurate and complete record of the incident.

DIRECTOR'S ROLE IN NEGOTIATIONS

Because the director has close contact with teachers, students, classified staff, parents and advisory committees, he/she can make a valuable contribution to the board's bargaining team. Although it is essential that the director develop and maintain rapport with all members of the faculty there can never be any doubt about his relationship or loyalty when the chips are down in collective bargaining. He is always an important member of the district's management team. He must realize that collective bargaining is an adversarial relationship. Although teachers are nice people when involved with the collective bargaining process, the director and other administrators must act to defend and protect the rights of students and parents.

Whether involved in collective bargaining at the table or in an advisory position, the director must be thoroughly informed of the progress of negotiations. First, the director will be better able to interpret the negotiated agreement if he/she understands the meaning and intent of the provisions to which management and the union agreed in negotiations. Without knowledge, the director may unknowingly relinquish matters the bargaining team worked hard to get or keep.

Secondly, the director can facilitate both upward and downward communications during the negotiations process by keeping the superintendent informed about unresolved employee problems which may appear as union demands at the table and by informing employees of the status of negotiations in order to minimize and eliminate undesirable rumors. He can also apprise the bargaining team of employee reactions to various board and union proposals.

Finally, when fully informed, the director can assess the impact of board and union proposals on his/her ability to effectively manage the school.

The director may be able to provide the board's chief spokesman with valuable information. This information may be helpful in forming proposals and counter proposals as well as formulating bargaining strategy.

This information should include:

1. A summary of grievances filed, and expressed complaints and concerns.
2. Analysis of members of the union's bargaining team.
3. Demographic data about memberships.
   a. number of males, females.
   b. number married, single.
   c. resident, non-resident.
   d. heads of households.
   e. age.
4. A summary of complaints and concerns expressed by students, parents and advisory committee members.

Depending on the school, the director may serve as a member of the board's bargaining team. As a member of the team, the director must follow the lead and directions of the chief negotiator. Some chief negotiators will assign specific tasks to team members, i.e., taking notes, observing, creating a diversion, etc. Some chief negotiators will not permit members of the team to speak at the table unless he/she specifically asks them to do so. Others will encourage frequent interjections on the part of the team members. The director must religiously adhere to the selected strategies. Away from the table the director can provide a valuable service. Researching past practices and collecting and analyzing data, are important but time consuming activities which may be delegated to the director.

Frequently what is being discussed at the table is the district's right to act in some manner. These rights usually are directly related to the director's right to manage the vocational operation. Therefore he/she can help to arm the chief negotiator with rationale to support the board's position. The director must be able to logically justify his practices and procedures. He/she must also be flexible and practical. Negotiation is a game of compromise, of give and take. The director can aid the chief spokesman by suggesting alternatives for the development of counter proposals.

In times of strikes and "chalkdust blahs", the director must be in a position to readily insure the safety of students and staff first and secure the building and equipment secondly. The director should be involved with the development of contingency plans in order to maintain services or to close down the school in an orderly manner.

Finally during the post-job action period the director will play an essential part in restoring good working relations and positive morale. In this situation the director must work particularly hard to rebuild employee trust and confidence and to re-establish harmonious relationships with the union.

SEX EQUITY AND AFFIRMATIVE ACTION IN PERSONNEL RELATIONS

Policy of State Board of Education of Ohio. The State Board of Education has been operating under the following Economic Opportunity Policy since January 27, 1972.

> Discrimination of any form or degree is prohibited. All persons shall receive equal treatment regardless of sex, race, religion, color, or national origin.
>
> State employees shall be recruited, appointed, assigned and promoted on the basis of individual merit as determined by this department and the Department of Civil Service.
>
> Any qualified person shall be eligible to take part in any on-the-job training program, either sponsored or participated in by this Department without regard to sex, race, religion, color, or national origin.

This State Board of Education policy provides a statement for their *Affirmative Action* Program, which follows:

> The Department will maintain an affirmative action program designed to insure that there will be no discrimination on the basis of race, creed, color, sex, or national origin. This affirmative action program will cover the internal employment of the department as well as the departmental relationships with the public, including those persons and organizations doing business with the state.

On *hiring practices and recruitment* the Ohio Department of Education policy states:

> The Department will maintain hiring practices designated to achieve a reasonable representation of minority employees at every job level. Cooperation will be maintained with the Department of Personnel, the Ohio Civil Service Commission, and the Ohio Civil Rights Commission in the departmental recruitment program. When it is deemed necessary, such cooperation shall include prior notification of job openings and such reports may be requested. The Department will specifically notify all sources of recruitment, employment agencies, placement bureaus, colleges and universities, that it does not discriminate on the basis of race, religion, color, ancestry, sex, national origin, or place of birth; that the Department actively solicits minority group applicants, and that it will discontinue the use of sources where it appears that direct or indirect discriminatory practices exist.

In regard to *upgrading and promotions, demotion and layoffs, and training*, the Department expresses:

> The Department will review all procedures relating to *transfers* and *promotions* to insure that all such actions are taken with regard to equal employment opportunity practices.

The Department will review all procedures relating to *demotion* and *layoffs* to insure that all such actions are taken with regard to equal employment practices. The Department will cooperate with The Ohio Department of Personnel in utilizing training programs designed to admit minority group members to require employment with the department. Department inservice programs will be continued to promote advancement at all levels.

These Ohio Department of Education policy statements should be of value for adaptation purposes for school districts in their preparation of equity and affirmative action.

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CHAPTER III

AN INSTRUCTIONAL SYSTEM DESIGN FOR DEVELOPMENT OF VOCATIONAL EDUCATION CURRICULUM

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This chapter presents a summary of a booklet prepared by the Ohio Division of Vocational Education 1976 entitled *An Instructional System Design for Vocational Education.* It was authored by Byrl R. Shoemaker, Director of Vocational Education in Ohio, and edited by Darrell L. Parks, Ohio Assistant Director of Vocational Education, in charge of curriculum and staff personnel development.

The dominant goal, for which vocational education is held accountable, is to prepare individuals for and assist them to obtain meaningful employment. To achieve this goal, vocational education must *systematically design* an instructional program that is based upon occupational skill and technical knowledge requirements. Additionally, the *system* must provide for the appropriate organization of educational resources in order to optimize the efficiency and effectiveness of the teaching/learning process. This resulting *instructional system* must be an integrated combination of resources. These resources include students, instructors, materials, equipment, facilities, techniques, and procedures which perform effectively and efficiently the functions required to achieve specified learning objectives.

Instructional System Design (ISD) is a system. It is necessary for each teacher to apply the system to his/her vocational program in order to activate it. Even though the system has universal applicability, it must be individualized to specific teacher, program, and environmental characteristics and conditions.

The use of the *instructional system design* (ISD) in course of study development will result in improved educational planning, better instruction, and a more highly satisfied and employable student.

This chapter has three major parts. In the first part, there is a treatment of the *philosophy for vocational education.* The second part covers *standard characteristics of vocational education.* The last part presents an *outline of procedure for the development of a course of study which makes use of the steps of the instructional system design pattern.*

A PHILOSOPHY FOR VOCATIONAL EDUCATION

The following statement of philosophy serves as a basis for the curriculum development process for vocational education in Ohio.[1]

1.0 Background

1.1 A philosophy of education must provide a reason for the structure and program of education offered or serve as a stimulus for educational change. A philosophy for vocational education must provide answers to such questions as:

1.11 Why should vocational education be offered as a part of the public education effort for youth and adults? What are the social bases, the economic reasons and the educational factors?
1.12 Who should be served by the vocational education programs?
1.13 What should be the nature of the organization, scope and content of vocational education programs?

The overall purpose of education in any society is to prepare people to perpetuate and improve the society in which they live. An educational program in any nation must be related to the political, social and economic patterns within the nation.

2.0 Philosophy Statement

2.1 *The nature of work in our technological society requires formal preparation for entrance into the work force. Vocational education, therefore, must be a significant part of the educational system in our society.*

Educational programs in any nation must be related to the political, social and economic patterns within that nation. An overall purpose of education in any society can be stated, "The purpose of a public education program is to prepare people to adjust to and improve the society in which it exists." The educational process, therefore, is constantly affected by the society in which it exists and by the social and economic factors prevailing in that society. Early efforts in education within our nation emphasized the literacy and citizenship training, since a republic depends upon a literate, informed and concerned citizenry.

As our society grew more affluent, more complex, free public education was extended upwards into the high school years. At the time the early high schools were organized the

large majority of youth attending high school did so as a preparation for attending college. Job skills, other than the professions, were learned by a pass-on procedure of father to son, through a process of apprenticeship, indenture, or through the pickup process.

Today the jobs available are not apparent to youth or adults. Only 4.7 percent of the jobs within that society are unskilled and only 12.6 percent of the jobs in that society require a baccalaureate degree.[2] The nature of the economy and nature of the work have limited the opportunities for apprenticeship or through learning by the pickup process.

2.2 *Vocational education is essential for and must relate to the productivity of people, not only in competence related to an occupation, but in the attitude towards that occupation and a willingness to produce.*

Studies by the Brookings Institute point up an economic base for vocational education within the curriculum.[3] Such studies indicate that while the United States was number one in growth-rate real output per man-hour for many years during the growth pattern within our nation, we no longer enjoy that basis for economic superiority. Such research indicates that the United States is dead last among the developed nations of the world in growth-rate real output per man-hour. Japan is number one, West Germany, number two, and the United States of America, number twenty.[4] Additional studies with regards to the factors relating to "growth-rate real output per man-hour" indicate that such growth-rate is made up of 15 percent machines, 36 percent knowledge related to production, 42 percent education and 7 percent miscellaneous.[5] A synthesis of these factors would show that our competitive capability, therefore, is related to the education of the people and vocational education is dedicated to improving the productivity of our work force.

2.3 *The uniqueness of vocational education is the preparation for work which permeates the vocational programs at both the high school and post-high school level.*

Vocational education cannot be classified as a unique discipline within the educational system. Rather, it can be identified as a program in which we combine the skills and technical content of various disciplines with the practical requirements of the world of work in order to prepare a young person to succeed technically and socially in the world of work. Vocational education, while not unique as a discipline, is unique as a program and this uniqueness is reflected in facilities and equipment needed for the instructional program, curricula instructor qualifications and student goals and services.

Since employability is the goal of vocational education, the program must make contributions to the development in students of citizenship qualities, work habits and attitudes, safety judgments, understanding of occupational choice, and in other factors common to many elements of other educational programs. Compatible skills of communication, decision-making, learning to learn and personal and occupational responsibility are equally important and equally within the purvey of vocational education. These "true salable skills," and the individual's capacity to transfer them regularly and usefully to his/her work and life needs throughout life, require that vocational education emphasize the development of such conceptions.

Vocational education has an excellent opportunity to instruct in such common learnings. If vocational education programs, however, do not maintain the uniqueness of preparation for work which is not found in any other educational program, it is questionable as to whether the added costs of vocational education justify the offering of the program for instruction which could be gained in other programs of learning.

2.4 *Vocational education programs must be available for youth 16 years of age and older at both the high school and post-high school levels and for adults throughout the work life of the individual.*

Instruction within the vocational education programs must be compatible with educational theory and principles of learning growing out of research in psychology and education.

Decisions relating to the starting point for vocational education within the educational program for youth and adults must relate to the studies on child development and occupational choice. Studies in guidance relating to occupational choice indicate that a young person's occupational choice becomes reasonable at age 16 if they are provided education for choice.[6] Observations not yet substantiated by research suggest that psychologically youth become goal-oriented at age 16, and any mandatory educational program at that age or beyond must relate to such goals. It is a fact for the majority of youth that high school is their last chance for a full-time educational program. It is also clear that a number of youth want to delay or have their first opportunity for vocational education after they leave high school. The rapid changes in occupations and the needs of adults for retraining and upgrading instruction throughout their work life point up the need for facilities and programs to serve the needs of

youth and adults in all areas of education in the nation.

2.5 *Vocational education is an important part of the educational program, and the nature and quantity of vocational education must be in keeping with employment patterns and trends locally, state and nationally, in that order.*

Every set of objectives, including the "seven cardinal principles of education,"[7] "the ten imperative needs of youth,"[8] developed by a national principals' group or the "developmental needs of youth,"[9] as identified by Havighurst, all establish the importance of preparing youth for employment who are not going on to college. Emphasis in education, both at the high school and collegiate level, however, has essentially focused on a subject-centered college-preparatory curriculum at the high school level and subject-centered professional curriculum at the collegiate level. Research pointing to the lack of correlation of success of the college preparatory program in relation to success in college raises serious questions about such an approach.[10] Only in recent years have significant developments been made in both high school and post-high school vocational and technical education in preparing youth for employment in occupations other than professions. The needs of the individual and the society, the technological developments within our nation, the basis for our competition within the world markets, research within education regarding the learning process, and the over-all purposes of education within any society would lead planners in the field of education to include preparation for both paid and non-paid work as one of the significant goals of the educational process.

In taking a position of significance in the educational system, vocational education must recognize and address the rising rate of permanent unemployment, the increasing rate of job change and the continually changing nature of most jobs.

2.6 *Both the competencies and the interests of the individual must be considered, but the opportunities within and needs of society in which the individual will participate must be considered as vocational education programs are established.*

A philosophy for vocational education must grow out of and be in harmony with a total philosophy of education for the individual and/or the society in which he lives and works. The importance of the individual within an educational program is without question. Some philosophers, such as Socrates, have made the concern for an individual the all-important factor within their philosophy.[11] Other philosophers, such as Aristotle and Georg Wilhelm Friedrich Hegel, who came after Socrates, saw man as a social being who could find his identity or reality only in the State.[12]

Interests of the individual must be considered in establishing a vocational program, but employment trends must indicate a good chance for employment of graduates from such vocational programs.

2.7 *Instruction within vocational education programs must be compatible with educational theory and principles of learning growing out of research in psychology and education.*

A study of the learning process itself will show that the early philosophers in education, such as Rousseau, Pestalozzi and Froebel, saw the need for the inclusion of student experiences within education. Psychology of learning provided a research base to prove many of the concepts of the early philosophers. Principles of learning growing out of these psychological studies were stated by Gerald Leighbody as follows:[13]

We learn best when we are ready to learn. When we have a strong purpose, a well-fixed reason for learning something, it is easier to receive the instruction and to make progress in learning.

The more often we use what we have learned the better we can perform or understand it.

If the things we have learned are useful and beneficial to us so that we are satisfied with what we have accomplished, the better we retain what we have learned.

Learning something new is made easier if the learning can be built upon something we already know. It is best to start with simple steps which are related to things we can now do or which we already understand and progress to new and more difficult tasks or ideas.

Learning takes place by doing. Before the learning can become complete, we must put into practice what we are attempting to learn.

The principles for vocational education outlined by Prosser apply learning theory and results of psychological studies on learning to programs of vocational education.[14]

2.8 *Vocational programming requires a time commitment of sufficient length and intensity to provide instruction in the several domains important to the successful entrance of the student into and their progress within the occupation of their choice.*

A sound vocational education program must be concerned with the employability of the student upon completion of the vocational program and with the ability of that student to adjust to technical changes within that occupation and changes in the social setting of the occupation. The curriculum for vocational education, therefore, must be concerned with and provide instructional experiences relating to the psychomotor, the cognitive, the affective and the perceptive domains as they relate to preparing the student for employability. Since the unique role of vocational education is preparation for employment, the physical facilities and equipment, qualification of the instructional staff, the organization of the curriculum and the recruitment, enrollment and placement of the students must all reflect the unique role of vocational education within the curriculum as well as the commitment of vocational education to the common learnings demanded of every educational program.

Vocational education is a program and adequate time must be provided for the learner to gain the skills, technical knowledge, social attitudes and competencies essential for entrance into or progress in employment.

2.9 *An effective vocational education program requires competency in reading, writing and arithmetic and experiences leading to a sound occupational choice.*

There are no semi-skilled, skilled or technical occupations which do not require literacy in terms of the basic skills of reading, writing and arithmetic. If such skills are not present when a student enrolls in a vocational program, they must be taught concurrently with the skills of an occupation.

An individual can likely be successful in several different occupations. Each person, therefore, must be provided experiences prior to enrollment in vocational education which: motivate them to want to work and to respect all work; orient them to the various semi-skilled, technical and professional occupations available in the work force; and give them the opportunity to explore selected occupations to determine their interests and capabilities.

3.0 Summary

3.1 *Vocational education programs, based upon the principles outlined, must be provided for all eligible age levels, all ability levels, in all sections of a state and the nation. Programs must be occupationally based and designed to meet the needs of both an individual and the society in which he exists. Vocational education starts with the job and ends with the student successfully employed on the job.*

STANDARD CHARACTERISTICS

1.1 Philosophical and Educational Foundation

Initially, a program of vocational education must be founded upon a sound philosophical and educational base. Without such a base upon which to build, the program will have neither stability nor direction.

The program philosophy should reflect the fundamental purpose of vocational education and its place in the social, economic, and educational environments. Specifically, the philosophy should address two fundamental questions:

a. Why vocational education in lieu of or in conjunction with other educational concepts?
b. How does vocational education meet current and projected social, economic, and individual needs?

The educational program should be a core curriculum aimed at preparing individuals for employment. Such a vocational education base must embrace the principles of learning which emphasize the effective use and application of knowledge taught.

The philosophical and educational foundation for vocational education can be strengthened by a state leadership point of view. However, such a foundation must be subscribed to or adjusted at the local level if it is to be effective.

Subsequent to the formulating of a philosophical and educational base, it is necessary to structure and implement an effective delivery system for vocational education. Such a delivery system must possess a set of standard characteristics if the state educational agency (SEA) and the local educational agencies (LEA) are to fulfill their respective leadership roles in program development, implementation, and administration.

1.2 Constituency Support

Although treated as a separate entity, building program constituency is dependent upon and

closely allied with program philosophy, quality, and outcomes. However, the importance of program constituency merits discussing it independently.

Constituency support does not come about automatically, but must be cultivated and nurtured at all program levels if vocational education is to prosper and grow. Vocational education is a service effort for both the individual and business and industry. Close relationships must be developed and maintained with persons who need vocational education and agencies who employ its graduates in order to assure currency and relevance. Vocational education functions within and as part of the social and economic environment. Community involvement and input must be sought and taken into account if public support is to continue . There must be laws and regulations and financial support for vocational education if it is to reach its potential in services to our society. Finally, vocational education must be packaged in such a manner that it appeals to the needs and interests of a significant segment of the student clientele.

Ultimately, the goal of building a constituency is to attain the degree of commitment and support for vocational education that will assure its prominence and permanence on the educational scene. Thus, each program level and, in fact, each individual program offering must identify and effectively utilize its appropriate constituency.

1.3 Program Planning

It is the responsibility of the SEA to establish an adequate program of vocational education for all people in all parts of the state. In order to fulfill such a responsibility, careful and detailed planning on a statewide basis is essential. Such planning must be based upon a set of statewide goals and measurable program objectives and the effective utilization of valid regional or statewide data and information.

Once developed, the state plan for vocational education must be translated into LEA level plans of action. SEA and LEA plans of action will have to be compatible. Hence, a standard characteristic of vocational education at all levels should be a carefully developed and documented plan that is based upon a set of specific goals and measurable program objectives and which will facilitate and support subsequent planning and programming efforts.

1.4 Program Development and Expansion

Like most social movements supported and financed via local, state and federal taxes, vocational education must compete for the limited tax dollar. Based on the assumption that vocational education needs exceed available revenue, it is essential that optimal use be made of available dollars. This necessitates a carefully derived pattern for program development and expansion. Thus, a fourth standard characteristic of vocational education should be the existence of a comprehensive pattern for program development and expansion, supported by legislation and fiscal commitments at the state and local levels, and taking into account occupational needs, student base, and educational resources available or required.

1.5 Program Standards

In order to provide the quality of services needed by students and employers and to assure an effective use of fiscal and educational resources throughout the state, it is essential that vocational education programs be built around and maintained upon a set of appropriate program standards. These standards should address the "four factors of production" of vocational education: curriculum, facilities and equipment, instructional staff, and students. Consequently, a fifth standard characteristic of vocational education standards should be addressed to the "four factors of production," that contribute to and enhance the quality of instruction. Such standards must be accompanied by appropriate mechanisms for monitoring and enforcing them.

1.6 Personnel Development

Regardless of the soundness of the program philosophy, the comprehensiveness of goals and objectives, or the appropriateness of program standards, the degree to which vocational education is effective is largely dependent upon the availability of quality state and local leadership and occupationally competent instructional personnel. An adequate supply of competent personnel is too important to leave to chance. Thus, a sixth standard characteristic of vocational education should be a well defined and operative program of professional personnel development which assures an adequate supply of leadership and occupationally competent instructional personnel imbued with both the technical and pedagogical skills and understandings essential to program development and operation.

1.7 Program Evaluation

Program review and evaluation are key ingredients to any program's success. Program review in vocational education should embrace two dimensions: process and product evaluation.

Process evaluation is formative in nature, and its primary purpose should be the improvement, development, and expansion of vocational education. This evaluative component assures the effectiveness of the program variables of curriculum, facilities and equipment, instructional

staff, and students. Comprehensive evaluation measurer of a formative nature should provide for an extensive self-review of programs at the operational level, involving representation from business, industry, parents, and students, as well as an external assessment from an SEA perspective.

The degree of success and support enjoyed by vocational education will be largely dependent upon the number of students who obtain full-time employment and who perform satisfactorily on the job. Student placement and follow-up is essentially a product or summative evaluation component and is the accountability measure for vocational education. Placement and follow-up evaluation are primarily LEA responsibilities and not only reflect the quality of the educational program, but also assess the soundness of the philosophical and educational base upon which the program has been built.

A basic standard characteristic of vocational education is a mechanism which provides for periodic formative and summative program evaluation. It is desirable that such a review process includes an LEA self-review and an external review from the SEA level. The evaluation mechanism should also provide a means for review follow-up and program redirection. Placement and follow-up of graduates, however, is the ultimate test of vocational education services.

2.0 Summary

Standard characteristics of vocational education must be an outgrowth of a philosophical foundation. Once the standard characteristics have been determined, operational criteria must be established for each standard characteristic. The establishing of such criteria must once again evolve from and relate to the program philosophy.

The goal statements called for in the standard characteristics have been established for Ohio, based upon the concepts of management by objectives. Also, the program standards and operational criteria called for in the standard characteristics are present as a basis for program organization and operation. Program standards and criteria in Ohio provide a basis for approval of programs of various length and depth. It is possible under program standards in Ohio to offer a program limited in both length and depth at either the high school or post-high school level. The curriculum development pattern reviewed in this document, however, will relate to a program of sufficient length and depth to provide for adequate development of the cognitive, psychomotor, and affective learning essential to prepare a youth or adult for entry into employment in a chosen occupation requiring significant skills and technical knowledge.

INSTRUCTIONAL SYSTEM DESIGN FOR THE DEVELOPMENT OF A COURSE OF STUDY

This section presents in outline form the development of a course of study following the *instructional systems design* pattern. The course of study developed following the procedure outline will provide a basis for approval of the content by the board of education; for evaluation and monitoring of the instructional program by educational leadership; and for the teacher in determining what is to be taught, how it is to be taught, when it is to be taught, in what order, with what resources, and to what level of achievement. Any instructional activity within a shop, laboratory, or related classroom should be explainable in terms of the course of study and its goals—enabling students enrolled to reach a job objective.

I. Produce the Occupational Analysis
   A. Definition: Occupational Analysis—A process that examines an occupation and lists the performance skills and knowledges which are required of the occupation.

   B. Procedure:
      1. Specify the role
         a. work behavior
         b. non-work behavior

      2. Identify and verify the tasks in the specified role through:
         a. job description
         b. interviews
         c. task observation of expert performance
         d. task inventory
         e. task survey

3. Analyze the tasks; identify task requirements
   a. performance steps
   b. technical skills and knowledges
   c. behavioral attitude
   d. safety
   e. divisions
   f. mathematics principles
   g. science principles
   h. communication skills

II. Develop the Course Outline

A. Definition: Course Outline—A list of tasks which are selected to be taught in the local program. This list is selected by the local supervisor, instructor, and advisory committee after studying occupational data and information.

B. Procedure

1. Select and list tasks to be taught
   a. Prepare from the occupational analysis or analyses which apply to the particular program the list of tasks included.
   b. Complete an occupational task survey with business and industry in the local community to determine:
      (1) frequency of workers performing each task
      (2) percent of workers performing each task
      (3) and any other pertinent information
   c. Add topics to cover personal development, human relations, and career information.
   d. Submit the lists of tasks with added survey information to the advisory committee for decisions on those tasks which will be included in the program. Additional factors for consideration in these decisions include:
      (1) entry level requirements of the occupation
      (2) time limits of the program
      (3) facilities available or projected
      (4) equipment available or projected
         (a) possibilities for work stations
         (b) possibilities for live work, mock-ups, or simulations
         (c) possibilities for "out of school" community resources
      (5) budget available or projected
         (a) materials
         (b) supplies
      (6) target population

2. Finalize the list of tasks to be taught in each year of the program.

3. Submit to the school administrative officers for review.

III. Prepare The Instructional Program Objectives

A. Definitions

1. Instructional Objective—A description of the performance you want students to exhibit before you consider them competent.
2. Program Objective—Broad program outcomes, that in total provide a broad overview of the entire program. They establish the program parameters and provide a broad basis for evaluation.
3. Module Objective—More specific than program objectives and includes statements addressing each competency covered in the module.
4. Task Objective—Relate to a given task which is a component of the module.

B. Rationale

There must be measurable attributes observable in graduates of a program or it is impossible to determine whether or not the program is meeting the objectives. Without clearly defined instructional objectives it is impossible to evaluate a course effectively and there is no sound basis for selecting appropriate materials, content, or methods.

C. Structure of Objectives

1. Outcome—what is to be achieved
2. Level of achievement—standards or criteria to determine how well it is to be achieved
3. Conditions of performance—under what conditions it is to be achieved

D. Classification of Objectives

1. Affective domain—includes values, attitudes and feelings
2. Psychomotor or skill domain—includes manipulation of materials and objects
3. Cognitive or knowledge domain—includes mental or intellectual abilities
4. Perceptual domain—a nondocumented area in the classification of objectives. The perceptual domain includes objectives that refer to utilizing the senses in analyzing and diagnosing problem situations.

E. Procedure
1. Examine program philosophy
2. Prepare overall program objectives
3. Examine instructional groups
4. Organize modules within the instructional groups
5. Prepare module performance objectives

IV. Determine and State Instructional Program Strategies

A. Definition: Instructional Strategies—Methods of planning, organizing, manipulating, and integrating facilities, equipment, instructional aids, materials, time, and students within the limits of school policy for the purpose of teaching tasks and related content.

B. Strategies to be Considered

1. Establish the type of curriculum organization
   a. subject centered
   b. correlated
   c. integrated
   d. core—Vocational education lends itself well to the establishment of a core curriculum in which the occupational goal of the student becomes the center point for the program and all the skills, technical knowledge, discipline, related instruction, and development of work habits and attitudes are included within the curriculum pattern.

2. Determine the basic method to be used for presentation of the psychomotor or task-oriented part of the curriculum.
   a. practice on real jobs
   b. practice on models
   c. simulation
   d. combination

3. Decide whether students will receive demonstrations on each of the tasks in terms of the total class, small groups, or individuals, or whether students will receive instruction only on a coaching basis.

4. Determine the order of approach—what order the tasks will be taught - simple to complex, known to unknown, job order, parts to whole, whole to parts, or an order based on frequency of performance.

5. Decide, depending on facilities, whether all students will be instructed on the same task at the same time or if it will be necessary to combine the youth into teams and to rotate these teams through a number of tasks during one time frame.

6. Determine the source for practical work and/or simulation materials that will be the basis for instruction and practice.
   a. support and limitations of existing facilities
   b. nature of the occupation
   c. procedure for obtaining practical work as needed in the instructional order

7. Determine the place, amount and procedures for "production," in which all or many students work toward the completion of an end product, as compared with "student work" in which each student carries to completion his own project.

8. Determine to what extent and how the related technology will be correlated with the tasks of the occupation —assignment of one teacher for both the laboratory and related classes or different teachers for each.

9. Decide on tools for student use—will all tools be furnished by the school and kept at a central point for use or will students be required to purchase a set of basic tools for their own individual use?

10. Decide on a plan for obtaining special parts and supplies.
    a. delivery procedures
    b. accounting procedures

11. Determine procedures for formative and summative evaluation.

V. Sequence The Content

A. Definitions

1. Scope—The depth and breadth of the task and instructional content to be taught in a particular course.

2. Sequencing—The process by which learning experiences are structured to provide the most learning in the shortest time; arranging tasks in the most appropriate order for effective learning.

B. Factors That May be Considered in Arriving at the Scope of the Course
   1. Sequence for early need—The experience of some steps or tasks must be provided early so that other selected and assigned tasks can be accomplished.
   2. Sequence on the basis of normal business or industrial operation—Many specific steps or tasks must be accomplished in a specific sequence so that a product or service can be completed.
   3. Sequence for frequency of use—The most frequently used steps or tasks should be taught first so they can be applied in a multiplicity of student experience without the necessity of individualized instruction.
   4. Sequence from the simple to the complex—An application of the laws of learning.

C. Procedure for Sequencing Course Outline
   1. Sequence duties
      a. consider seasonal factors
      Examples: Planting and sales - horticulture, turf, poinsettias for Christmas
      Auto mechanics - live work on cooling systems just prior to winter season
   2. Sequence tasks on basis of students' readiness.
      a. consider complex test equipment which should be taught in later stages of simple-to-complex sequence.
         Example: white room test equipment in diesel mechanics
   3. Sequence within tasks in the following cases
      a. steps which must be taught early so they can be used with other tasks to follow
      b. steps which follow normal business or industrial procedure
      c. most frequently used steps early in the program

IV. Group And Schedule The Instructional Program
A. Definitions
   1. Group—A series of tasks or modules grouped together for instructional purposes and placed in a general time frame.
   2. Schedule—A timed plan for a procedure or project.
   3. Module—A subdivision of a group of tasks or competencies, composed of lessons taught in close sequence.
B. Factors to be Considered in Grouping:
   1. Number of students
   2. Facilities
   3. Equipment
   4. Materials
   5. Time
   6. Subject content
C. General Concepts on Grouping
   1. Grouping is necessary when the cost of equipment precludes its use on an individual or student pair basis. Thus, the rotation of student teams is required during a given time frame.
   2. A group of duties and tasks provides a timeline which can be used as the basis for the organization of related instruction content.
   3. Grouping is a process of synthesis accomplished as a strategy in instruction. It should be distinguished from blocking, which is generally considered to be a part of the thought process in analyzing an occupation.
   4. Although most often the group will consist of a number of tasks from the same duty, it is not confined to that organization. It can consist of a group of modules within a task, or tasks can be drawn from different duties to compose the group.
   5. It should not be interpreted that grouping is necessary or expected in all occupational areas, nor that grouping is necessary or expected for the total instructional program in any one occupational area.
   6. Grouping can apply a variety of equipment types and associated instruction strategies such as practice activities, live work, production projects, learning centers, learning activity packages, simulations.
   7. When groups are organized, a time period should be allotted in the laboratory for instructor demonstrations.
   8. It should be planned that the small group team activity should be a quality learning experience. Busy work should not be included for the purpose of maintaining the group organization.
   9. The complexity of group organization requires diligence in scheduling.
   10. Grouping should be such that all students are engaged in an educationally planned and instructive experience at all times, either in observing the instructor demonstration or actively participating in the small team effort.

D. Procedures for Grouping
   1. Consider available laboratory space and equipment and determine which student experiences can be grouped so that each student can have each experience on a rotational basis.
   2. Examine the tasks in each duty; judge sequence levels of tasks which must be grouped and select combinations of tasks for groups which are as nearly as possible closely associated in the sequential order.
   3. Identify equipment and procedures for work stations within groups.
   4. Determine from the plans for the total year the days that can be allotted to each group.
   5. Decide on the number of work stations which are reasonable for each group.

6. Estimate the time required for completing the work at each work station.
7. Determine the number of students that can be accommodated on a team at each work station at the same time.
8. Determine the number of students required for each team to rotate all students through the tasks within the allotted time.
9. Balance work station time by combining tasks for a team, including shop management duties or review experiences.
10. Estimate days for instructor demonstration.
11. Sequence the groups into the year's schedule.

E. Scheduling Procedures
1. Estimate time required for the experience of each module.
2. Estimate time required for the experience of each group.
3. Match modules within groups so that short-term modules can combine to interface with a long-term module.
4. Chart the modules for a rotation plan of student teams or individual students through work stations, learning experience centers, or learning activity packages.
5. Establish timelines relative to
   a. school day division
   b. total length of school year and vocational program

VII. Organize The Related Instructional Content

A. Definition: Related Instructional Content (Related Technical Knowledge)—The information and understanding that a worker needs related to the manipulative tasks of the occupation.

B. Scope of Related Instruction:
1. Cognitive learning
   a. skill processes
   b. planning
   c. theory of operation
   d. relationship of processes or parts
   e. terminology—nomenclature
   f. safety—hazards
   g. judgment—perceptions
   h. mathematics—science
2. Affective learning
   a. work habits
   b. attitudes
   c. safety judgments
   d. interpersonal relationships
   e. dress, grooming, language
   f. honesty, responsibility, accuracy, dependability

C. The Occupational Analysis is the Source for Related Content

D. Laboratory Grouping is the Basis for Related Content Timeline Determinations

E. Procedure for Selecting and Organizing Related Content:
1. Examine group content and timelines.
2. Select related content from the occupational analysis to correlate with the groups.
3. Judge content and select that which should be taught first and in sequence to meet the needs of all or most students while they work on different modules or tasks in the laboratory.
4. Chart the content to fit group timelines. Use planning sheet for daily related technical content.

VIII. Develop Evaluation Strategies

A. Definitions
1. Evaluation Strategies—Methods of determining the success of an instructional process, including the necessary planning to insure the accurate appraisal of learner achievement in relation to behavioral objectives.
2. Formative Evaluation—An appraisal process designed to determine if a student is progressing satisfactorily; if, in fact, he understands what is being presented.
3. Intermediate Summative Evaluation—The evaluation that takes place between the formative and summative stages. It evaluates progress of students at the end of major units of instruction.
4. Summative Evaluation—An appraisal process designed to determine how well the student has met the behavioral objectives.

SUMMARY

We have presented in this chapter an analysis of an *instructional system design* for use by vocational education planning districts in Ohio for the development of the scope and sequence of the curriculum for vocational education . The system provides for vocational educators to carry out nine specific procedural steps which are:

1. Carry out occupational research analysis to determine student needs, employment needs, and needs of a particular job.

2. The school works jointly with the business and industrial community in the development of a course outline from the tasks derived through the research occupational analysis. This course outline will reflect the local school personality and acceptable technical work methods.

3. Specification of performance objectives in terms of the cognitive, psychomotor, and affective domains. By clearly defining student expectations, the instructor is able to determine student achievement and program success.

4. Development of instructional strategies by the instructor. Decisions must be reached concerning such items as: The nature of the practice experiences, demonstrations, sources of the practice work, how the instructor will coordinate the skill development with the related content, and how the student will be evaluated.

5. The instructor plans the appropriate sequence in which the tasks will be taught. This sequencing of duties or tasks is based upon the instructional strategy plan arrived at in the fourth step mentioned above.

6. The instructor plans for scheduling and grouping. The instructor must consider the facilities and equipment available for instruction. The instructor may have to group a series of tasks so that all students are actively involved in instruction and practice.

7. The instructor selects the related technical instruction content from the occupational analysis to correlate with the duties and tasks as grouped and scheduled in Step 6.

8. Lesson Plans and Instruction. In planning individual lessons, the instructor uses the performance objectives and related content from the course of study to develop a step-by-step breakdown of the information to be presented.

After the lessons are presented to the students, the instructor gathers information to ascertain whether the students have met the requirements. This evaluation plays a very important part in ISD because course revision can take place to ensure student success.

9. The culminating step in the ISD calls for planning both formative and summative evaluations. The formative evaluation is a part of each lesson or demonstration within the instructional program. Sub-summative evaluations come at the end of groups of demonstrations or the completion of blocks of instruction. The summative evaluation is based upon actual performance of the tasks by the students and their eventual placement in employment positions. Once the graduate is on the job, he/she, too, becomes a source of new information that can be fed into the system and thus assure greater success. The system is self-correcting to meet the needs of both the employers and the students.

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CHAPTER IV

LEADERSHIP STRATEGIES AND TECHNIQUES IN CURRICULUM DEVELOPMENT

Charles W. Nichols

ORIENTATION

As we address the subject of Leadership Strategies and Techniques in Curriculum Development it is important that we review briefly our conceptual base. The role and nature of curriculum development in vocational education must be considered.

Vocational education has long been included as a part of the total program of education. As a part of the total program, it should be recognized that from a curriculum point of view, many commonalities exist between vocational education and general education. However, the vocational curriculum has numerous characteristics which distinguish it from other forms of education. These characteristics identify a curricular focus that includes occupational analysis, curriculum building, and immediate and long term outcomes.

Traditionally, the vocational curriculum has been product or graduate oriented. While a primary goal of vocational education has been to provide a curriculum that assures successful achievement of the content, the ultimate outcome is more far-reaching than just the educational process. "The ultimate success of a vocational curriculum is not measured merely through student educational achievement, but through the results of that achievement—results that take the form of performance in the work world. Thus, the vocational education curriculum is oriented toward process (experiences and activities) and products (effects of these experiences and activities on people)."[1]

Curriculum is essential to quality vocational programs and the achievement of the goals of the instructional program. Equipment and supplies are important, instructional materials are important, methodology is important, but curriculum is basic and fundamental to all elements of successful instruction. Based on the fundamental role of curriculum content, the design and the development of curriculum are critical. Additionally, it is, in the final analysis, the responsibility of the Vocational Director to provide adequate and effective leadership in the area of curriculum.

The term "curriculum" means different things to different people. In fact, the authorities in curriculum design and curriculum development disagree on terminology, procedures, and concepts. To some, the term curriculum includes the entire educational environment. To others, it means the content of a specific course. While there may be disagreement on the specifics of the terms associated with curriculum development, there is agreement on the general concepts. For our purposes, the following definitions will be used throughout this paper.

Curriculum - the sum of the learning activities and experiences that a student has under the auspices or direction of the school.[2]

Course of Study - a comprehensive plan which shows the scope and teaching sequence of all the activities provided for a particular subject in a curriculum.[3]

Instruction - the planned interaction between teachers and students that results in desirable learning.[4]

As a vocational director fulfills the leadership role in curriculum, it is necessary to realize that the key element of that leadership is involvement. Everyone who is affected by the curriculum should be involved in the curriculum development process. Obviously different people will be involved in different ways and to varying degrees. But it is important to understand that involvement is essential.

In the following pages, we shall consider the principles and techniques for managing curriculum development in vocational education designed to maximize the involvement of key individuals and groups.

MANAGEMENT PROCEDURES

This section will deal with management procedures and strategies appropriate for vocational directors in providing leadership in curriculum development. This section will identify the individuals and groups associated with curriculum development in vocational education and discuss the nature of their involvement.

Board of Education

It is critical that local Boards of Education be informed relative to curriculum development events. They must be aware of the goals, process, personnel, resources and financial commitments. It is the reponsibility of the Board of Education to establish policy which will facilitate and support the curriculum development effort. The vocational director is responsible for developing the channels of communication and make recommendations for board action.

Superintendent of Schools

Official implementation of the board policy is the direct responsibility of the superintendent of schools. The cooperation of the superintendent is essential to a successful curriculum development effort. Rarely does the superintendent personally implement Board of Education policy. Often implementation is accomplished by delegation of authority. The key person to whom the superintendent delegates authority in terms of vocational curriculum development is the Director of Vocational Education. The director must work closely with the superintendent to keep communications open and to develop an atmosphere of teamwork and cooperation. The director must recognize the importance of educating the superintendent relative to the details of vocational curriculum development.

Principal

The role or involvement of the principal will depend greatly on the organizational structure and the job description within the particular school system. Generally, the principal serves in a coordinating role. The principal should be informed of the goals, the decisions, and the procedures to be used in the curriculum development effort. The principal should have input to the curriculum decisions. He should be aware of proposals that are being considered. Additionally, he should be aware of innovations that teachers are attempting. It is the responsibility of the vocational director to insure that open and complete communications take place with the principal.

Teachers

This is absolutely the most important group to be involved in the curriculum development process. Vocational directors cannot develop curriculum in a vacuum. There must be extensive involvement of the teaching staff.

The relationship between the vocational director and the teachers is vital to successful curriculum development. Listed below are six principles which should guide the efforts of vocational directors in working with teachers.

1. Change in the curriculum results from change in the teacher.
2. Teachers change as a result of involvement in curriculum development.
3. Change in the curriculum occurs as people change through participation in decision making.
4. Change in the curriculum is produced through inservice education that develops new teacher perceptions and skills.
5. Change in the curriculum is a result of supplying teachers with consultants who assist them.
6. Change in the curriculum is effected by providing workshop opportunities for key teachers who then become resource persons and leaders for other teachers.

Specific procedures and techniques which Vocational Directors should use in working with teachers include:

- ***Know your stuff***—You should be knowledgeable about curriculum and curriculum development.
- ***Share your knowledge***—As director you need to be involved in sharing your knowledge with the teachers.
- ***Provide leadership***—You need to recognize that sound curriculum development necessitates change and one of your roles is to lead that change.
- ***Provide time***—If curriculum development is important to you it should merit the provision of time to accomplish the goal.
- ***Provide direction***—Curriculum development should not happen by accident. You must establish general goals and provide direction toward the achievement of those goals.
- ***Provide personnel***—Teachers should be provided secretarial, supervisory, and consultative services. It is your responsibility as Vocational Director to insure that needed personnel are provided.
- ***Provide logistical support***—Paper, forms, duplication services, and supplies should be made available to teachers to insure successful completion of the curriculum development effort.
- ***Involve people***—Develop a team concept and utilize all team members.

• ***Encourage teaching staff***—Effective curriculum development is not easy. Teachers need almost constant encouragement, motivation and feedback.

• ***Serve as a resource person***—You should be available to give of your self. This should include your time, your labor, your expertise, and the needed resources which you possess.

• ***Leadership in out-of-school contacts***—Many out-of-school contacts must be made in the community, business, and industry to facilitate and coordinate successful curriculum development.

• ***Provide inservice education***—This is an important element of change and improvement. You as vocational director should make provisions for inservice education.

• ***Plan your work and work your plan***—Effective curriculum development demands that you plan the effort in great detail and then implement the plan of action you develop.

ADVISORY COMMITTEE

One of the most productive, effective, and rewarding leadership strategies is the involvement of local advisory committees in vocational curriculum development. While this paper is not devoted to a discussion of utilizing advisory committees, it is important that local directors understand the organization and operation of local advisory committees. Based on the assumption that this understanding already exists, our purpose in this paper is to address a set of guidelines for working with advisory committees in vocational curriculum development. Listed below is a set of guidelines which are designed to insure effective involvement of a local advisory committee.

1. Broad representation from the occupational areas.
   An advisory committee should be selected from all occupational areas. Selection of committee members from a narrow, limited occupational base will decrease the value of the advisory committee's contribution.
2. The committee shall be of adequate size to provide adequate representation and provide sufficient input and manpower to achieve the goals of the committee.
3. Possess the approval and support of the local Board of Education.
5. Educators should not dominate the advisory committee.
6. Advisory committee members should have a clear understanding of their legal and operational roles.
7. Advisory committee members should be informed relative to the power and the value of their recommendations.
8. Regular and consistent communications are essential to effective advisory committee performance.

Additional specific suggestions relative to advisory committee roles in curriculum development are provided.

- Engage in appropriate studies of curriculum problems.
- Determine and identify community needs.
- Provide job analysis and employment entry requirements through manpower and skill needs surveys conducted jointly by school and employment service manpower specialist.
- Provide job analysis information developed by individual employers in a particular business or industry.
- Assist educators in developing and revising curricula by providing consultants.
- Identify new and emerging skills, concepts, and practices that should be included in the curriculum.
- Provide feedback from citizens in the community and from incumbents and managers in the occupation.
- Communicate with parents and workers in the occupation relative to curriculum issues and decisions.
- Assess curriculum recommendations.
- Assist in curriculum evaluation.
- Review reports of curriculum development efforts.

CURRICULUM COMMITTEE

One of the problems facing vocational educators involved in curriculum development is the coordination of efforts. Some schools have learned that direct administration by the supervisory staff may inhibit the teaching staff. Teachers often see this type of organization as authoritative even if that is not the intent of the supervisor or the administrative team.

A successful approach to overcoming this problem is the creation of local school curriculum committees or councils. The name given to this group of people is less important than the function of the group. Basically, two types of committees have emerged. First, the *general curriculum committee*, also sometimes called *the steering committee*. This committee is deisgned to be an

ongoing committee that functions year after year. Such committees often employ policies which provide for the rotation of members, but the work of the committee continues on a somewhat permanent basis. The second kind of organization is often referred to as an *ad-hoc curriculum committee*. This group is appointed to accomplish a specific task. Sometimes the committee is appointed for a specified length of time. However, even if a time frame is not established, when the ad-hoc curriculum committee completes its assigned task the committee is abolished and ceases to exist.

In the interest of clarity, a review of the purpose of curriculum committees is in order at this point. The purpose of either type of curriculum committee cited above is to coordinate and facilitate the process of curriculum developments. Communication throughout the school or school system is an essential feature of the coordination and facilitation function. In an effective program of vocational curriculum development many decisions must be made. Curriculum committees provide a democratic structure for faculty, parent, student involvement in the decision making process.

Important to any discussion of curriculum committees would be the identification of a set of principles which could be used to guide in the formation and operation of curriculum committees.

- The organization and structure should be as simple as possible to minimize red tape, complex hierarchy, and distorted communications.
- The committee must have official approval and support. This means that the Board of Education and the Superintendent must be fully informed and must have officially endorsed the creation of the committee and provided the necessary resources to enable the committee to function.
- The committee membership should be representative of the teaching staff.
- The committee membership should include representation of the supervisory and administrative staff.
- The committee membership should include parents, students, community representatives.
- The committee should be organized in such a way as to provide a framework for formulating recommendations and policies.
- The committee should be organized in such a way as to facilitate change in curriculum, in people, and in the curriculum development process.
- The committee should be organized in such a way as to facilitate continuous, two way communications.

A list of specific functions could be identified for curriculum committees. However, no list would be complete for all committees. The specific functions of a curriculum committee will depend on the school organization, the charge given to the committee, the needs of the school at the time the committee is formed, the philosophy and orientation of the administrative team and numerous other factors.

Four major functions exist for any curriculum committee. These functions are identified here and explained briefly.

First, the committee should be charged with the responsibility to identify curriculum problems. This is an important first step. This function implies a system for determining the curriculum problems that face teachers. It also implies a need for open communications.

Secondly, the committee should have the responsibility to study the problems that have been identified in step one above. This action may include study from a research approach or it may include study from the standpoint of determining what other schools use in the solution of specific problems.

Thirdly, the curriculum committee should have the responsibility to recommend solutions to the problems which have been identified and studied. The recommendations should be presented in writing and should be openly communicated to those involved.

Finally the committee should be charged with the responsibility to assist and coordinate the implementation of solutions which are accepted. This can involve a variety of specific actions depending on the nature of the solution.

Vocational educators have traditionally made minimum utilization of curriculum committees. Experience in other areas of education have verified the value and the contribution of curriculum committees. Vocational directors should devote greater attention to utilizing curriculum committees to facilitate and coordinate the curriculum development process.

COOPERATIVE CURRICULAR ACTIVITIES WITH HIGHER EDUCATION

An important component of sound vocational curriculum development is the utilization of resource people, materials, and information. Every vocational program in Ohio has available important and valuable resources. This section of this paper will deal with two specific resources. (1) Colleges and Universities, and (2) Technical Institutes and University Branches.

Universities throughout this state have faculty members who possess education and experience with curriculum design and curriculum development. Some of the faculty have backgrounds in the broad field of curriculum in general education. A number of universities have faculty with strong backgrounds in vocational curriculum development. Universities are currently becoming more oriented to providing service to local schools. Faculty are available as consultants, both paid and unpaid, to assist vocational programs in the curriculum development process. Workshops, courses, seminars, conferences, inservice sessions, and individual consultation are all vehicles by which university faculty members can contribute to more effective curriculum development.

Research conducted by university faculty and students also represents a resource available to vocational directors as they initiate curriculum development efforts. It is equally possible for university faculty members to assist vocational teachers and administrators to conduct research and field studies relative to local curriculum problems and issues.

Many university programs have developed forms and materials to facilitate curriculum development. Often these materials have been used in classes, workshops, conferences and inservice programs and have been refined on the basis of that use. Generally, these materials are readily available to local programs.

Another important source of assistance for vocational directors are technical education programs available through technical institutes and technical programs in university branches. The assistance provided by technical education programs is of two types, (1) technical and (2) manpower coordination.

Technical help consists of advanced courses and knowledge in some of the areas represented in the secondary vocational programs. Generally technical program faculty have a strong background in the mathematics, science, and theory of the occupation. Often technical education laboratories will contain advanced equipment or testing facilities that can provide comprehensive knowledge and skills for the vocational instructors.

Additionally, assistance is available from technical education programs from the standpoint of coordinating the preparation of manpower for the local or regional labor force. By initiating dialogue and discussion with educators in technical education, it will be possible for secondary vocational educators to eliminate program duplication or program gaps.

While the two services described above may not seem, on the surface, like major contributions to curriculum development, they are important sources of information which influence curriculum decisions. Vocational directors need to devote attention to the "societies" they serve, and consider the unique nature of the subject matter to be taught as important sources of curricular decisions.

CURRICULAR ACTIVITIES THROUGH YOUTH ORGANIZATIONS

Another important source of information and activities for vocational curriculum development is the youth organization. The current position of local, state, and national leaders in vocational education enhances the legitimacy and value of youth organizations as a curriculum source. A few years ago state and national authorities adopted the position that vocational youth organizations should no longer be considered extra curricular, but instead should become a vital and integral part of the curriculum. This position has significant implications for vocational curriculum development. Youth organizations as a part of the curriculum applies to all youth organizations in all vocational service areas. There are several ways in which curriculum activities can work through the vocational youth organizations.

Involvement of youth organization members in curriculum decisions and activities is a major strategy which can be employed. For example, as curriculum committees are utilized in the schools, representation of the youth organization members should be a vital consideration. Youth can and should be involved in identifying problems, studying solutions, making recommendations, and assisting in implementing the solutions.

Secondly, vital curriculum content and the resulting activities can come from the materials relating to youth organizations. Such topics as parliamentary procedures, personal leadership skills, work habits, attitudes, and productivity should be incorporated into the curriculum.

Finally, the curriculum should provide for a firm relationship between the activities and precepts of the youth organization and the occupation for which the youth are preparing. The scope of the curriculum should be based on the knowledge and skills generated by a study of the youth organization. Youth can gain experience and knowledge by assisting in making curriculum decisions, planning and recommending curriculum activities, and by participating in the activities that have been planned.

INCORPORATING CURRICULAR EXPERIENCES WITH PRESS, RADIO AND TELEVISION

The common forms of media, i.e., press, radio, and television often are overlooked as important ingredients in curriculum development. Teachers generally regard the press, radio, and television as important modes of communication in daily activities of life. Yet many teachers do not view press, radio, and television as relating to curriculum development even in a minor way.

The thrust of this section of this paper deals with ways in which classroom and laboratory curricular experience can be strengthened by utilizing the press, radio, and television. The power of these media, the availability of each source, and the number of people reached and influenced by these media, mark them as significant and powerful tools in implementing curricular experiences.

The press occupies a unique role in the education function in the United States. Most papers are written at a reading level that enables most individuals to read and understand the message presented. Additionally, the diversity of topics covered in newspaper articles provides sufficient scope so as to interest most people. For example, the following kinds of articles should be of interest to vocational teachers: job want ads, articles dealing with occupational economics, unions, reports on business and industrial activity, and information on productivity.

A broad well designed curriculum in vocational education should include some of these topics. Thus, press articles and features can be used to supplement instruction.

Radio, while not as powerful as the press does provide a means of reaching large numbers of people. Specific programs that relate to work, news programs, and special broadcasts can all be used as a part of the curriculum expriences of vocational students.

Television is another powerful source of curriculum expriences. The broad variety of programs, the dramatic impact of television, and the different types of television programming combine to provide a significant instructional device.

Numerous programs relating to occupations and work, news programs, closed circuit television, and special programs through educational television are examples of experiences that can be used in conjunction with vocational education curriculum. The options are limited only by the imagination and creativity of the teachers, supervisors, and administrators in the vocational program.

As Director of Vocational Education, you have two roles that appear, on the surface, to be conflicting. Your first role is to encourage, to illustrate, and to support the use and the correlation of media sources to the course content. It is important that media be employed to supplement and maximize the curriculum. Secondly, you as Director, have a responsibility to insure that media sources are not misused. Like films and other types of media the press, radio, and television should not be used to entertain or to save the unprepared teacher. They should, however, be used to clinch a point, to enhance a lesson.

CURRICULUM RESEARCH

In reviewing the issue of curriculum research, it is important to clarify the difference between experimentation and research. Experimentation consists of simply a tryout of a new procedure and noting the differences which result from the tryout. On the other hand, formal research is viewed as the conduct of highly controlled experimental designs carried out according to sound research procedures and with rigorous data collection, evaluation, and analysis. While a great deal more curriculum research needs to be done, the average teacher cannot be expected to do studies of the magnitude, controlled conditions, and scope that are required to be classified as research.

There are, however, opportunities for teachers and/or school administrators to become involved in research studies that are conducted cooperatively between the schools and universities or schools and the State Department of Education. Such efforts then combine the best worlds of practical problems with formal research skills and resources. There is a serious need to translate research findings into practice, pilot studies, development of new experimental devices, models, theories and demonstrations.

Another approach, which lies on the continuum between experimentation and formal research, is action research. Action research in education is defined as research undertaken by practitioners in order that they may improve their practices. It is characterized as a type of organized inquiry undertaken by school teachers and administrators to study their problems scientifically and, as a consequence, improve their own procedures. As this relates to curriculum it becomes a scientific inquiry dealing with problems, issues, practices, processes, and solutions relative to curriculum development and implementation. Action research is a valuable approach to evaluating curriculum improvement.

Action research is a testing of curriculum theory and practice and, as such, it is an evaluation of curriculum improvement. Action research includes the following steps (1) identification of the problem, (2) development of a proposal for action including selection of research methodology, (3) selecting the course of action and developing the hypothesis, (4) planning for the collection of data including data gathering methodology and instruments, (5) taking action and gathering evidence, (6) drawing conclusions from the data, and (7) communicating the findings to others.

Action research is important to sound curriculum development and curriculum improvement. Action research also can be accomplished cooperatively by the public schools, universities, and the State Department of Education. Teachers tend to have more confidence in action research than in formal research. Directors, supervisors, teachers, and parents can, through action research, systematically appraise new procedures developed for or initiated by a school. Information is gathered as evidence for school and community alike to share.

DEVELOPMENT OF CURRICULAR MATERIALS

In light of the recent thrust in Ohio to develop courses of study, it is not the intent of this paper to review the elements and the process involved in writing curriculum materials. Instead, this sedtion of the paper will be primarily devoted to a discussion of the leadership strategies a vocational director can use to accomplish the development of curricular materials. Attention will also be devoted to the importance of each of the curriculum items and to review the roles of individuals and/or groups involved in the development of the various materials.

One of the most important items of curricular materials is the task analysis. Its importance stems from the fact that the analysis contains a list of all the tasks which must be demonstrated and practiced in the laboratory and a list of all the related technical instruction topics which must be included in the classroom phase of the curriculum. The analysis represents the base upon which all other curricular materials are developed. There is agreement in Ohio that the development of the task analysis is the responsibility of the State Department of Education, Division of Vocational Education. Thus a discussion of strategies for the development of the task analysis is not needed here.

The program objectives represent an early step in the development of curricular materials. Present day educational practice suggests the program objectives should be written in behavioral terms. This is consistent with practices within the field of vocational education. It is important for a vocational director to remember that objectives should always be written at two levels. The first level is for the program. Program objectives are general and apply to the total two year program for each taxonomy. The second level and objectives are for the individual lesson. Our discussion of objectives at this point will deal only with program objectives.

The objectives should be viewed as the first step in the process of translating the content of the task analysis to the final course of study. Teachers often view the writing of objectives as an unnecessary activity. Teachers generally feel they know what they want to accomplish in their program and see little need to waste time writing out a set of objectives in "fancy" language. It is very important that the director communicate with teachers, directly or through the supervisory team, relative to the importance of developing a set of appropriate well written objectives.

Several strategies can be employed by vocational directors to accomplish the task of preparing a set of program objectives. First, it is important to let the teacher know this is a team effort. Both the junior and senior teacher should be involved, but additionally their supervisor, director, and the craft advisory committee members should also be involved. A team approach will provide psychological support, assistance in making decisions about objectives, and will demonstrate to teachers the importance of this step. Secondly, the teacher should be encouraged to concentrate on the objectives only at this point. Many times teachers fall into the trap of "looking ahead" and becoming concerned about the many steps in preparing a course of study, the size of the completed course of study, and the magnitude of the job ahead. If they can be taught to take one step at a time recognizing, however, the relatedness of each step, the task of preparing objectives will be recognized as being possible.

The course outline is relatively easy to prepare. The course outline is taken directly from the task analysis. Experience indicates that once the teacher understands the process of translating the contents of the task analysis to the course outline, they have little difficulty preparing the outline. However, teachers often misunderstand the role of a course outline. They assume that once the outline is prepared their curriculum development activities are now complete. It is very important they understand the relationship between course outline and course of study. They must recognize that a course outline is not a "teaching document." Teachers need to realize the course outline is another step in a process.

The course of study is ***the*** most important curricular document. It is the course of study that guides the content of the program, and in fact, the instructional process. The course of study must be based on the individual program. It must be prepared in full recognition of the objectives of the program, the available equipment, the nature of the students, and the instructional materials. Every vocational director must understand that a course of study is not easy to prepare for the average teacher. However, quality vocational education is not built on what is easy.

The following leadership strategies can and should be employed by the vocational director.

1. Recognize the magnitude of the task—Have empathy.
2. Reinforce the importance of the course of study.
3. Provide appropriate motivation.

It is impossible to list all motivational techniques in this paper. The incentives that really motivate depend on the teacher and the director, it also depends on the needs of each person involved, and it depends on the morale within the teaching staff. The important message here is—this phase should not be taken for granted and overlooked.

4. The director must get involved with the teacher in this process. "They must get in the trenches also."
5. The director must provide the personnel, material, financial, and time resources required to "get the job done."

The thing that most teachers really resent relative to course of study preparation is being given, as they see it, an overpowering job and then being "abandoned."

IMPROVING SEX EQUITY IN VOCATIONAL EDUCATION

Philosophically the public schools have a responsibility for helping all students develop their intellectual, emotional, and physical abilities to the fullest extent possible. This implies a school commitment to sex equity in the educational program. Students must learn that sex roles do not relate to the field of employment. Sex equity is especially important for vocational educators as they prepare youth for the world of work.

Vocational education programs must reflect a commitment to sex equity in course content. This includes every day activities and attitude of teacher and student alike. Some implications for program practices with sex equity in evidence are listed below.

- Youth group activities are administered without regard to sex of the member.
- Skill and performance are the basis for success in the programs, disregarding whether male or female.
- Curriculum materials should have sex-fair occupational descriptions which accurately reflect performance requested.
- Curriculum materials used in vocational education programs should be reviewed and revised for the purpose of eliminating sex bias, sex stereotyping, and sex discrimination elements.
- Both sexes should be consistently represented in printed and audio-visual curricular materials.
- All occupations should be presented as appropriate for qualified persons of either sex.

To date, enrollments in vocational education programs show noted distribution differences. Males are concentrated in agriculture and trade and industrial programs, while females are concentrated in home economics, health, and business and office education.

Recent data on vocational education enrollments by sex show us that there has been some movement away from traditional sex stereotyped vocational fields by both males and females. However, these changes have been slight thus far.

Vocational educators are in a position to encourage females to pursue skills so that they will have more occupational alternatives when they enter the working world. Limited educational opportunities for young women foster unskilled adults who cannot support themselves or their families. In the past women have been prepared largely for occupations which tended to be lowly paid. The statistics show that currently, nearly 70 percent of all women working are employed in three occupational groups: clerical, service, and technical. Two-thirds of the women that work are in the categories of single, widowed, divorced, or whose husbands earn less than $7,000.00 per year. Most women work because of economic necessity.

In the past, women have been denied opportunity in the professional world and men have been denied opportunity in home, family, and interpersonal situations. Both sexes have been limited in occupational alternatives because of traditional role expectations. Change is necessary to eliminate unfair sex stereotyping and bias on employment within all occupations.

DEVELOPMENT OF LESSON PLANS

Curriculum authorities disagree about the extent to which lesson plans are part of the curriculum. Some authorities contend that lesson plans are an important part of the total curriculum development process. Other authorities maintain that lesson plans are not part of the curriculum, but are instruments used to implement the curriculum content. However, there is no disagreement over the position that lesson plans are important. This author maintains that lesson plans are a vehicle of instruction not curriculum.

Lesson plans are designed to accept the content of the vocational program and translate that content into methodology and process for instruction. Curriculum development is a necessary prerequisite to lesson planning. One cannot develop a lesson plan unless content has been identified around which the lesson plan can be written. Curriculum development is the process by which the content has been identified, sequenced, experiences have been selected, and knowledge has been organized. All of these steps are essential to lesson plan development.

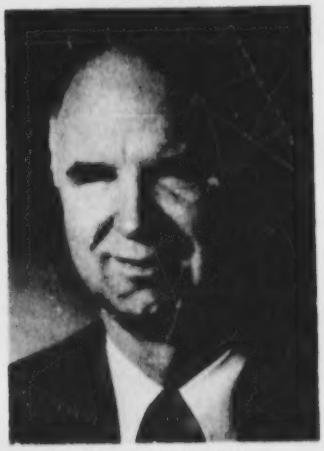
Lesson plans represent a source of potential conflict between teachers and supervisors and/or directors. Teachers sometimes view lesson plans as an overly formal approach to putting in writing what they (teachers) already know. Vocational supervisors and directors view lesson plans as a vital symbol of good organization. Based on the experience of many teachers and administrators more emphasis should be placed on lesson plans.

Lesson plans should, however, be placed in proper perspective. They are a natural culmination of the curriculum development process. They are highly important links between curriculum and instruction. They represent a semi-formal document which translates the occupational content to the methodology for teaching that content. As such, the lesson plan is a very important step in the curriculum—instruction process.

Great care should be taken by vocational directors to choose a lesson plan format that effectively achieves the translation referred to above. A format should be devised and selected which facilitates the implementation of the curriculum, one which serves as the next step which transmits the culture of the occupation to the students in the laboratories and classrooms.

ENDNOTES

1. Curtis Finch and John R. Crunkilton, *Curriculum Development in Vocational Technical Education.* (Boston, Allyn and Bacon, Inc.) 1979, p. 9.
2. Ibid, p. 7.
3. J. W. Giachino and Ralph Gallington, *Course Construction in Industrial Arts, Vocational and Technical Education.* (Chicago, American Technical Society.) 1967, p. 19.
4. Curtis Finch and John Crunkilton, *Curriculum Development in Vocational Technical Education.* (Boston, Allyn and Bacon, Inc.) 1979, p. 9.



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CHAPTER V

LEADERSHIP OF SUPERVISION OF INSTRUCTION

James E. Boyd

NATURE OF MODERN SUPERVISION

Historical development of supervision has evolved the role of supervisors to helping school personnel to improve the teaching/learning situation creatively. Even with this direction there is disagreement among professional educators as to what supervision really is. Some authorities would classify the supervisor a strictly professional official, trained to do an administrative job. Another group would establish an opposite direction by removing the supervisor from all administrative duties and responsibilities. This group of educators then are implying that the main responsibility of the supervisor is to help teachers meet their problems. Some educators would center the emphasis of supervision around human relations and would interpret the supervisor's role as the effective use of group processes with teachers, pupils, and other school personnel. A fourth group of educators would identify the supervisor's position as a teacher of teachers—improving instruction through programs of inservice. Still another group of educators regard supervision as a task including both supervision and curriculum revision and/or curriculum development. In this role, the supervisor has the responsibility of helping teachers and the responsibility of stimulating curriculum development.

Even these are not all of the concepts of the supervisor's job that are advocated in one section or another of the country. The type of school organization also creates a variety of opinions as to the responsibility of a supervisor.

In this wide range of disagreement concerning supervision and the task of the supervisor, an uncertainty frequently evolves. In one situation, the school administrator may have one concept of the supervisor's job, which is not held by the supervisor or the teacher. In another situation, the supervisor may understand his responsibilities differently than those expected by the school administrator and the teacher. In yet a third situation, the teacher's perspective of the supervisor's role may be different than that of the supervisor or the school administrator.

Much has been written concerning who supervisors are and what is supervision in a school system. This writer feels this identification should be formulated by the combined thinking of the superintendent, director, supervisors, and teachers when at all possible. The supervisor's job description is vital to establish the role of the supervisor in any organization. With this description, the workload of the professional staff with respect to time allotted and the span of control of each supervisor or administrator can be established. In addition, the job description should include an effective system of communication, adequate records, retrieval of information, and policy systems through which all members can readily be informed.

The nature of modern supervision today includes a creative supervisor who continually fosters activity and self-leadership within the staff while helping teachers become less dependent upon outside direction and more reliant upon themselves.

G. C. Kyte[1] noted that the administrator's organizational activities should be governed by certain principles. An efficient administrator:

1. Formulates a definite, well-organized plan of activities.
2. Provides for a democratic, cooperative program of working relations.
3. Provides for the necessary authority and definite responsibility which will insure educational leadership and professional organization.
4. Utilizes scientific knowledge, skill, and attitudes.
5. Is kind and understanding.

Organization for modern supervision should direct the systematic and continuous effort to encourage a teacher to become more effective in the achievement of established educational objectives. T. H. Briggs and J. Justman[2] offered lists of both negative and positive principles which should influence the administrator's organization for supervision.

The negative principles included the following points:

1. Supervision should seldom, if ever, be arbitrary or authoritative. It should not be based on personal power.
2. Supervision should never be divorced from a constant recognition of the goals of education.
3. Supervision should not be largely concerned with trivia, nor should it be

concerned only with the immediate.
4. Supervision should never be nagging or impatient.

The positive principles in the organization of supervision included:

1. Supervision should be constructive, creative, and democratic.
2. Supervision should rely upon the collective resources of the group rather than upon the efforts of the supervisor alone, and should be based upon professional rather than personal relationships.
3. Supervision should seek to promote the growth of teachers by developing their special strengths.
4. Supervision should be concerned with the personal welfare of teachers and with good intrastaff relations.
5. Supervision should begin with conditions and practices as they are, and should be gradually but persistently progressive.
6. Supervision should be adapted within proper delimitations to the capacities, attitudes, and even the prejudices of the professional staff.
7. Supervision should be characterized by simplicity and informality, and should be cumulative in its results.
8. Supervision must be objective and rigorous in self-evaluation.

CLIMATE AS A CONTROLLING FACTOR IN STAFF AND STUDENT ATTITUDE AND BEHAVIOR

It is not always easy to keep in mind that the administrator or other educational leaders do much to establish group norms of personal relations. When the administrator demonstrates he is genuinely considerate of other people, he values them and considers them important, and he does not punish expressed reflections on his judgment, he does a great deal to establish an atmosphere that makes for better human relations throughout the school. This kind of behavior on the part of the educational leader, however, is not always easy. Administrators are like everyone else in that they vary greatly in personal sincerity, self-confidence, and self-respect. An administrator who is somewhat fearful and has doubts about his own capacity and is sensitive about his own judgment cannot behave in such a way as to make it easy for others to express themselves candidly.

Perhaps the key to this issue is forming and maintaining effective working groups. Much of the behavior of the individual can be understood in the context of the small groups in which he works. Commitment to goals, acceptance of leadership, effectiveness of performance, and satisfaction with work all tend to depend on the relations of the individual with his immediate face-to-face workers.[3]

All individuals are more cooperative when they have learned to accept and trust one another, when they can communicate freely and share in the decisions of the group, and when the governance of their behavior is based on mutual respect. Understanding group life is essential in the promotion of effective leadership, for modern supervision is seen as a cooperative team effort aimed at the improvement of instruction.

ROLES OF ADMINISTRATIVE TEAM MEMBERS IN SUPERVISION

Superintendent

The superintendent of schools knows his/her most important task is that of improving instruction. This does not necessarily mean that present instruction is poor. However, it is a mark of every profession to continually increase its store of knowledge and to improve and refine its techniques.

A superintendent frequently becomes discouraged because so many of the duties he/she must perform seem so remote from the teaching process. Therefore, a superintendent should at times visit the classes of good teachers for therapeutic value. This activity tends to restore perspective. A superintendent is frequently frustrated by the multitude of problems that occupy time but realize that whatever can be done to create conditions so that better teaching will take place is a contribution to the improvement of instruction.

Most superintendents do more to improve instruction than they realize, especially in the areas of personal relations and cooperative undertakings. The superintendent must, however, be constantly aware and struggle continuously to avoid being caught and driven by the machinery of organization. He/she needs to back off from the job occasionally and look at the work objectively. It would be helpful to utilize the competent team members to seek constructive analysis and suggestions. However, each team member needs to understand that usually their advice is likely to be piecemeal because they may not have the advantage of seeing the total picture. No matter how much emphasis the

superintendent places on the team effort or how much help is received from the administrative team, he/she ultimately has to fit it all together.

Director

The director's chief role lies in his/her ability to control the environment of the school through dynamic leadership. Usually a director places high priority on the role of improvement of instruction. Although increasing demands upon his/her time tend to erode the director's role as an instructional leader. The director, however, must establish his/her priorities and clear the avenues for growth and improvement, identify talents and abilities in others, and release the potential within all persons concerned.

Assuming we accept the concept of leadership in the improvement of the instructional program as the role of the director, then the definition of responsibility becomes more meaningful and less overwhelming. The director then becomes the coordinator of knowledge and abilities and he/she strives for the development and improvement of the total instructional program.

Principal

The role of the principal in a joint vocational school may take an entirely different thrust than that of a principal in a comprehensive school setting. This writer views the role of a principal in a comprehensive school setting the same as just described as a role of the director. However, in a joint vocational school environment this role usually appears in an administrative support role to the vocational director. This individual likewise must have the same attributes as those of the director. He/she, too, is utilized for dynamic leadership qualities, but usually is assigned those administrative responsibilities of everyday operation to provide the director more time to function for the improvement of instruction.

Joint vocational school districts that include this position in their organizational format should be considered quite progressive. Even though the principal in this setting must have all of the viable qualities of a dynamic leader, the majority of his/her efforts are directed to the administrative functions that are so important to the improvement of the total instructional program.

Supervisors

The role of the supervisor in the administrative team is threefold:

1. The responsibility to provide individual help to the instructor.
2. The responsibility to coordinate and make more available to all personnel the instructional services of the school.
3. The responsibility to act as a resource person for the superintendent and other administrative personnel, as a special agent in training teachers inservice, and as an interpreter of the school and its program both to school personnel and to the public.

In order to discharge these major responsibilities in a competent fashion, the supervisor must be prepared to perform these major tasks:

1. To aid the teacher and the director in understanding students better.
2. To assist the instructor in making more interesting and effective use of instructional materials.
3. To help the instructor to develop and improve individually as a cooperating member of the school team.
4. To help the teacher improve his/her methods of teaching.
5. To assist the teacher in making the best possible appraisal of the teacher.
6. To make the specialized personnel in the school team of maximum assistance to the instructor.
7. To stimulate the teacher to evaluate his/her own planning, work, and progress.
8. To assist the instructor to achieve poise and a sense of security in his/her work and in the community.
9. To stimulate faculty groups to plan curriculum improvement and carry them out cooperatively and to assume a responsibility in coordinating this work and in improving teacher education inservice.
10. To acquaint the administrative team, the instructors, the students and the community with the work and the progress of the school.

The roles of the administrative team members just described will not necessarily fit each organizational plan throughout the state of Ohio. However, the responsibilities are important for the successful operation of an administrative team. Any configuration containing these major emphases is directed toward leadership for curriculum development and the organization and evaluation of instruction.

WORKING RELATIONSHIPS WITH SUPERVISORS

The supervisors who contribute to the improvement of the instructional program are perhaps the most important resource the director has for continued improvement. Therefore, it is extremely important that the director possess the skill in human relations so that he/she can secure maximum contributions from each supervisor.

It is of utmost importance that the director know each person well, what things he/she does well, what special talents and abilities he/she has, and the skills each possesses in organizing, writing, speaking, and working with others. The director who can readily address these qualities of each supervisor will be in the position of insuring the maximum benefits of the instructional leadership team.

The director should be reminded that the supervision of the instructional program is always his/her responsibility and authority. The supervisor performs under his/her direction; and if there is to be any improvement of instruction, it will result from an effective supervisory program. This can only take place when effective leadership promotes trust in one another. The director must establish open communications and involve the supervisor in the decision-making process.

WORKING RELATIONSHIPS WITH TEACHERS AND SUPPORT STAFF

The role of the director here is to establish a psychologically healthful climate that permits no fear, threats, or coercion. He/she can do this by recognizing that opposite opinions are an asset to the successful operation of any school system. The total staff should be made to feel free to express themselves without penalty. It is known that effective solutions to problems can be found in free discussion.

When the director utilizes this approach to problem solving, he/she must remember to evaluate all input and support the reasoning for final direction. This approach will allow further open discussion to problem solving. If he/she chooses to reject staff input, the staff will soon withdraw and refrain from open discussion; and then ideas which might benefit the total operation will be unheard. The director must continually foster creative thinking and discussion by all members of his/her staff.

Mr. D. E. Lawson[4] offered the following ten commandments for the humane administrator.

1. Do not rebuke or correct any teacher in the presence of students or any other persons.
2. Praise the teachers, and in the field of their special preparation, walk humbly.
3. Deal not lightly with any person's problem but treat it as if it were your own.
4. Forget not the days of your youth. Keep a sense of humor.
5. Honor your custodians and your teachers, that your days may be long in the job that the governing board has given you.
6. Let no child be judged by his behavior alone, but seek the causes of such behavior that they may be corrected.
7. Strive to see each child through the eyes of his parents, and treat that child with love as if it were your own.
8. When you have a teacher who is old in the service so that he/she no longer teaches well, deal with him tenderly and understandingly. (Teachers do grow older—and they don't just fade away.)
9. Be sensitive to the needs of your whole community and faith in people, for in that faith you will find your strength.
10. Have vision as well as devotion, that you might use all your talents for the benefit of all humanity.

The director must display belief in his/her total staff and here, too, realize that the people who contribute to the total operation of the school are the most important resource to his success.

SUPERVISIONAL WORK WITH GROUPS

The director who can effectively utilize the values of group dynamics can save valuable organizational time. The administrator can just as easily illustrate a point or help to bring a solution to a common problem for a group of teachers as he/she can by multiple visits to separate classrooms. Although he/she will spend extra time in developing skills in group procedures and in the organization of groups, the director can benefit greatly in the long run. Care must be exercised, however, to avoid situations which might waste time. One should not call a group together to meet every trivial problem, to handle a problem that could be handled by a bulletin, or to give attention

to a problem that is not important to members of the total group.

Every director needs to know how to release the power of the group, how to make staff meetings successful, and how to coordinate the work of the group. Unless he/she is competent in these respects, a large part of the effectiveness is lost.

One of the primary functions of the director is to see that all members of the group are made as comfortable as physical conditions permit. He/she should see that members of the group are well enough acquainted that they can proceed in a cordial, informal way. The director must see that the problem is clearly stated so it is understood by everyone. It is important to keep the group on the topic and headed in the right direction. Each member should be given a chance to make his/her contribution and receive credit where it is due. The wise leader sees to it that the group has a feeling of accomplishment as it makes progress.

Whether the group problem solving technique is used at a conference workshop, staff conference, or in the area of general research, the director should insure that a system of problem-solving is employed. The steps to be considered in supervisory problem-solving are as follows:[5]

Recycle as Necessary

1. Problems are selected, defined, and delimited. Objectives are stated clearly and operationally.
2. A survey is conducted of the situation as it presently exists.
3. Related research findings are reported to the group.
4. The problem is stated clearly, and hypotheses are formulated and tested. The barriers which are a function of the use of each suggest ed procedure are listed.
5. Accurate records are kept of the proceedings.
6. A critical appraisal of each proposal is accomplished.
7. The most powerful techniques available are used to analyze the data and the limitations inherent in the research design reported.
8. A summary in written form is formulated listing the findings, the conclusions, and recommendations for action.
9. The findings and recommendations are put to work.
10. The results of the research are evaluated and recommendations made for further investigation.

INDIVIDUAL CONFERENCES WITH TEACHERS

The individual conference is probably the most important administrative technique for use in the specific improvement of instruction. If correctly employed, it gives each teacher the special help he/she needs to become proficient in self-analysis, self-appraisal, and self-improvement. Being a form of personal interview, the individual conference provides an excellent opportunity for the two participants to define the subject to be discussed, to agree on the educational point of view, to recognize the need for improvement, and to solve the problem correctly.

The individual conference is a difficult activity because of the personal element involved. Misgivings are faced by both the administrator and the teacher, regardless of the amount of experience each has had. The administrator wonders if the teacher will understand the professional purposes and if his/her assistance will be thorough and clear.

New and experienced teachers alike panic at the thought of an individual conference. They will wonder what is wrong with their work and if what

they have done is really all right. If not, will they be given a chance to improve?

Preparation for a Successful Conference

Proper preparation for the individual conference is of utmost importance. The most important facet is the development of a solid working relationship with the teacher, which requires a great deal of time, effort, and skill in human relations. Anything less than a genuine interest and personal concern on the part of the administrator will be counterproductive. If teachers sense a lack of real interest, the administrator's efforts may be interpreted as intrusion. Intrusions will be rebuffed.

A relationship of mutual concern and trust, however, frees both the teacher and the administrator to do their best without being threatened. Energies can and should be channeled in a positive direction. When both are working toward the same goals, a conference period becomes not a time for judgment or defensiveness, but an opportunity for two professionals to share ideas on how to best get the job done.

Scheduling a Time and a Place for the Conference

Usually more importance is attached to the time an administrator schedules a conference than to the place it will be held. However, both are important; and the decision should be arrived at cooperatively between the administrator and the teacher. The important item of consideration here is to schedule the conference at a time when enough time can be allotted to allow for a discussion that is satisfying to both participants. Many times a conference before or after school will be best for this reason. Obviously, another consideration would be during the teacher's planning period.

Although a teacher should have a choice as to the meeting place, usually he/she will feel more secure within his/her classroom than in the administrator's office. Again, this should be a mutual decision with the administrator remembering that the important concerns are: 1) insuring privacy, 2) being careful to protect the teacher's ego, and 3) making certain the teacher understands the time and place for the conference.

The Administrator's Actions and Reactions During a Conference

One must be cognizant that the administrator is responsible for the success of the conference. As an instructional leader, the administrator must typify certain personal qualities and professional abilities if rapport is to be established with the teachers. Professional conduct begets professional conduct.

The following suggestions are offered for working with teachers in a conference situation. If conscientiously followed, they should result in a fruitful conference period. It is suggested that the administrator should:

1. Remember to be understanding. Try not to upset the teacher. Empathy should be emphasized. Show interest in the teacher as an individual.
2. Be sincere and friendly. Approach the teacher as a peer and as a qualified member of the profession.
3. Start the conference with a positive approach. Something must be all right.
4. Use all the time necessary; avoid appearing to be rushed. Listen carefully.
5. If criticisms are necessary, criticize methods and techniques rather than the teacher. The individual's psychological integrity must be protected and preserved. Proper rapport places the teacher at ease.
6. Help the teacher by leading the discussion. "How do you feel about teaching now?" "What has been the easiest facet?" "Where and when do you find it least easy?" Invite participation.
7. Accept and start with the teacher's problems as they see them. Cooperatively analyze difficulties and prescribe subsequent course of action.
8. Discuss possible solutions, i.e.:

   a. Classroom and laboratory management
   b. Developing lesson plans
   c. Methods to stimulate students
   d. Suggesting various styles of presentations and the appropriateness of each
   e. Suggesting various styles of assignments and the appropriateness of each
   f. Discussing techniques of how to help students participate
   g. Suggesting ways to check and evaluate

9. Suggest trying a new approach. Consider the possibility of this being an "off" day.
10. Offer ideas and suggestions. A teacher would rather have an idea expressed than to wonder what the administrator is thinking.
11. Say so if he/she doesn't know something. Beware of attempting to bluff, as the teacher may later learn the truth.
12. Be certain some course of action has been decided upon
13. Summarize with the teacher the ideas, findings, conclusions, and decisions brought out during the conference.
14. Provide for an adequate evaluation procedure.
15. Close the conference on a friendly note with praise or commendation. Be encouraging. Leave the teacher with something to grow on, to go on, and to glow on.

It is extremely important that an adequate record of the individual conference be maintained for future reference. This record will be the vehicle for planning future follow-up conferences.

The administrator should reflect the effectiveness of the conference and evaluate the techniques and strategies employed. Examples of

questions to be answered might include:

1. Was my approach during the conference one of control or correction, rather than one of punishment or revenge?
2. Was I fair but firm?
3. Was I gentle but firm in stating needs and/or requirements?
4. Was I kind and concerned with the teacher and his/her viewpoint but clear and precise in reviewing the problem?
5. Did I analyze the probable consequences of the proposed plans for solving the problem?
6. Was my voice control adequate?

The administrator's success in developing an awareness in the teacher that his/her professional associates share a mutual concern about the educational process and would be glad to assist them whenever possible may determine the difference between a mediocre and a skilled educator. The importance of including the teacher in the process of analyzing and prescribing must be emphasized. In addition, the teacher and the administrator must agree to effective methods and techniques of objective analysis. Only then can the factors observed during the course of the visit be treated adequately. Only then may the teacher and administrator be capable of professional consultation which may determine a program leading to the improvement of instruction. The administrator who displays a sincere interest in improving the program of individual conferences within the school will be rewarded by increased cooperation and enthusiasm on the part of the staff. Educators naturally respond to recognition of their worth as contributing members of the profession.

CLASSROOM VISITATION

The director must give considerable thought to classroom visitation for supervisory purposes. Many teachers fear a visit by the director, often with good reasons. Some teachers object to being told how and what to do. In addition they fear being threatened by someone who too frequently visits the classroom unannounced and on an unplanned visit.

The problem facing most directors is not the need for supervisory visits and conferences, but one of how to improve the practice in order to improve its effectiveness. To perform this function, the director must become proficient in the use of modern techniques for supervisory visits. This process begins with careful planning before the classroom visit. He/she might select from the following activities those which are applicable to a specific visit.

1. The director will be clear as to the purpose of the visit and will insure that the teacher has a clear understanding of his purpose.
2. The director will know as much as possible about the teaching/learning situation prior to his/her visit.
3. The director will discuss with the teacher the area of the instructional program with which the teacher has requested help prior to the visit.
4. The director will review all available pertinent materials, including records of previous visits and follow-up conferences which might pertain to the proposed visit.
5. The director will refer to any pertinent professional material.
6. Prior to the time of the supervisory visit, the director will plan with the teacher for a follow-up conference.
7. The director will complete a monthly schedule of supervisory visits and conferences so that he/she will know when and for how long he/she will be in the classroom.

The duration of the classroom visit should be determined by the type of teaching/learning situation being observed and by the type of visit. The frequency of the visits should depend on (a) the purpose of the visit and (b) who initiates the visit. If the director is observing a teacher who has requested specific help, the director should plan to return as soon as practical to gather more data or to demonstrate a teaching technique.

If the director initiates the visit, it is possible that he/she will plan to visit the teacher as often as the director's rotational schedule will permit. The frequency of classroom visits should be a regular function if an effective program is to exist. H. Spears[6] clearly states the needs for a regular program of visitation, commenting that perhaps fear of supervision results from the fact that visits are infrequent as well as from the fact that they are handled improperly.

In conducting the visit, the director should remember the teacher and the class are affected by what he/she does. Some points to consider concerning the management of the observation phase include:[7]

1. The director should gauge his/her mobility by the activity taking place in the class. If the class is engaged in the stimulation and planning phase of a creative writing lesson, the director will wish to observe at close hand.
2. The director will make his/her observation practice known to the teacher in the previsit planning conference.
3. Notes should ***not*** be made in the classroom but should be recorded directly

after the visit, in private. If the scheduled survey type of visit is being made and notes are taken by agreement in the previsit conference, the teacher should be shown the notes in the follow-up conference.

4. The director must keep an accurate and detailed record of the strengths and weaknesses of the lesson for follow-up conferences.

5. Emphasis should be placed on the teaching/learning situation and not on the teacher, and should gather data for the follow-up conference evaluation.

The director should prepare in advance for the observation by completing a listing of points to be observed. The following outline was prepared by one administrator and may prove helpful:[8]

1. Do the students participate in the selection and/or formulation of classroom standards of conduct? Is self-control encouraged?
2. Do students recognize the reasons for their being corrected? Are the observable or predictable consequences of an action stressed? Is disciplinary action considered a form of constructive criticism?
3. What is the teacher trying to accomplish? Is there a definite objective? Does the teacher seem to be guided by it?
4. Is the teacher's attitude friendly and accepting? Does the teacher ridicule or threaten? Is he/she overly familiar?
5. Is his/her voice well modulated and of sufficient volume?
6. Does the teacher have leadership qualities? Is he/she confident, positive and consistent?
7. Does the teacher know the subject matter? Is the teacher well prepared? Does he/she have adequate lesson plans? Does he/she plan for varied activities? Does he/she have materials and instructional technology readily available? Is the teacher well organized? Does he/she post an agenda for the period? Does he/she have a seating plan? Does he/she have an efficient way to handle routines? Does he/she have a definite place to write assignments? Are assignments clear, reasonable, pertinent and varied? Do they meet individual and group needs?
8. What teaching method or combination of methods and techniques are observed? Is the method used skillfully? What is the reaction of the class? Is there much participation? ***Caution:*** participation (or the lack of it) does not necessarily make a lesson. How much disturbance is there? How much enthusiasm?
10. Does the lesson come to a useful conclusion? Does the teacher provide for enrichment activities for fast workers? Does he/she show how the lesson relates to the present and/or future psychological world of the student?

USE OF CONSULTANTS

The administrator is faced from time to time with a problem of addressing concerns broader in scope or more specific in detail than his/her staff has the time or expertise to deal with. When this occurs, a specialist is usually employed as a resource person—a consultant— to address these specific assignments. Consultants may be used to assist a teacher or group of teachers with teaching activities, or in some project of larger nature.

Consultants are most likely to be located from various sources such as: 1) other educational institutions, 2) state departments of education, 3) United States Office of Education, 4) other federal sources, and, last but not least, 5) from business and industry. From the vocational education point of view, consultants from business and industry are perhaps the most viable source.

A sample of services that consultants might be acquired for are as follows:

1. Lead discussion groups
2. Make presentations on specific content objectives, trends, research and methods of teaching.
3. Discuss standards of achievement.
4. Assist with the development of curriculum guides.
5. Review instructional materials, textbooks, provide demonstration lessons and teaching techniques, and in the case of a consultant in business and industry, demonstrate vocational skills.
6. Prepare instructional materials for inservice training program and evaluate inservice activities for effectiveness.

DEVELOPMENT AND USE OF CURRICULAR AND INSTRUCTIONAL BULLETINS

The use of curricular and instructional bulletins has proven to be a valuable communication device. Its purposes are to acquaint all personnel more exactly with new ideas, plans, techniques, projects, methods, and materials. In addition they might be used to prepare for specific studies and reports, to initiate new interests and to keep the staff abreast of interesting practices carried on in their midst.

In a small school system there may be little need for an elaborate bulletin, since most teachers communicate daily.

At times, the bulletin may take the form of a handbook or guide. For example, the problem of

substitute teaching may require several bulletins, or a handbook containing a list of those things a substitute should be aware of in dealing with their obligations and responsibilities.

In a similar manner the director, supervisor, and in some cases their teaching staff, will from time to time prepare bulletins on other pertinent problems or tasks, such as reports to parents, proposed changes within the school, building-wide testing programs, career days, new teacher's guide, or curriculum bulletins.

The use of curricular and instructional bulletins is perhaps the most effective tool that administrators could use to improve effective communications. All too often, we're inclined to take the ability to communicate for granted because we talk to each other constantly, write memos and letters, and see the marvels of modern communication all around us. Despite this familiarity with communications, it remains one of the most difficult areas of administration.

Don't take if for granted that everyone gets the point just because there are no questions or because people say they understand. Attempt to make the best use of communication. Many people who speak clearly and express themselves effectively in conversation have a tendency to become flowery in written communication. Attempt to write simply and in the language of the reader. Remember, effective communication depends upon an exchange of meaning and understanding between the administrator and the staff.

USE OF RESEARCH

Learning, teaching, and supervision must all be studied with great care because of their complexity. It is no exaggeration to say that much of what is accepted in education today will be found in error tomorrow. Considerable progress has been made in our knowledge of these fields during the last half-century and more can be expected.

To address this topic, we have elected to deal with the organization and administration of research programs. There are many different methods of approaching this topic. To begin with, research may be privately or publicly administered. There are many important privately organized and administered research agencies such as those of the great educational foundation, the bureaus maintained by large privately endowed universities, and those maintained by education associations. Many governmental agencies also have research facilities, such as state and city bureaus of educational research. Then, too, research may be organized and administered on a local, state, or national basis. Many cities and states, as well as the federal government, maintain publicly supported research services. Finally, the function of research may be centralized in a bureau of the large school system, or it may be assigned to various school personnel, as it seems to be today in most joint vocational school districts.

Good school research depends upon the development of good records. No other agency has the same opportunity for good research as the school system where improvement needs and problems are anticipated, and collection of pertinent data is established. There are many long-standing problems in education relating to student guidance, student accounting, curriculum development, student adjustment, special needs, personnel administration, student placement and followup, school finance, buildings, and supplies and equipment. The services in these and other areas require careful study, including foresight, planning, and the development of an adequate system of records. Most systems today either have or have access to a computer in which data can be stored for easy recall to aid in their research.

As administrators gain more experience with research techniques and problem-solving, they begin to refine their approach to educational problems. One of these areas is the development of methods of analyzing educational data. We have already discussed the need for adequate records for this to be possible. Another technique is that of group action to study complex educational problems. This approach has advantages in addition to that of saving time and getting things done: 1) it uses the team concept of approaching a problem; 2) it provides a multiple check for error; 3) it provides for long-range development and followup studies not possible under individual leadership; 4) it provides the opportunity to study a wide range of problems confronting our schools; and 5) it provides for a solid foundation by including more people. Cooperation among individuals, groups, and agencies of all sizes is commonplace in the area of research today.

The scientific method of research appears to offer the best possible approach to the solution of educational problems because each point is pertinent to a complete thought. The merits of this approach are: 1) its knowledge is depersonalized and removes personal bias; 2) its information is based upon facts; 3) it employs analysis of complex facts; and 4) it offers objective measurement in collecting and treating data.

There are many excellent materials available on educational research, and it is recommended that the reader review other readings and select research methods to his/her individual needs.

ENDNOTES

1. George C. Kyte, *The Principal at Work* (Revised Edition; Boston: Ginn and Company, 1952), p. 9.

2. Thomas H. Briggs and Joseph Justman, *Improving Instruction Through Supervision* (New York: The Macmillan Company, 1952).

3. Bernard M. Boss, *Organizational Psychology*, (Boston: Allyn and Bacon, Inc., 1965), Chapter VI.

4. Douglas E. Lawson, An Address at Southern Illinois University, Carbondale, Illinois, 1955.

5. Emery Stoops, Joyce King Stoops, and James R. Marks, *Handbook of Educational Supervision*, (Boston, Mass: Allyn and Bacon, Inc., 1972), p. 248.

6. Harold Spears, *Improving the Supervision of Instruction*, (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1953), p. 62.

7. Emery Stoops, Joyce King Stoops, and James R. Marks, *Handbook of Educational Supervision*, (Boston, Massachusetts: Allyn and Bacon, Inc., 1972), p. 293.

8. *Ibid.*, p. 294.

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In addition to his nineteen years in education, he has eight years of industrial experience. He has served as president of Iota Lambda Sigma International Honorary Fraternity and the Ohio Vocational Directors' Association. He has been a guest speaker for many civic, community, local, state, and national organizations on vocational education. He has served as a curriculum consultant and writer for Educational Services Institute, Inc., as well as being the author of many articles on vocational education curriculum development and supervision of instruction.

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CHAPTER VI

LEADERSHIP OF STUDENT PERSONNEL RELATIONS

Leonard D. Kingsley

RECRUITMENT AND SELECTION OF STUDENTS

The leadership role of the Director in the recruitment and selection of students is predicated in part on the philosophy of the school and in part on the relationship established with the feeder or member school.

The position of the school with respect to the enrollment of students may range from those schools that have a strong commitment to accommodate all students who indicate a desire for vocational training, to those schools that have a highly selective identification and screening procedure and admit only those students who meet stated criteria. Most directors will find themselves giving leadership to policies and practices that fall somewhere between these two positions.

The term "recruitment" in the best sense carries with it the thought that the one being recruited has access to information which will allow a choice which is in his or her best interest. Translated into the school setting, this means that the director has responsibilities for making certain that the organizational structure is in place and that personnel have been assigned within the organization who have the skill and knowledge to perform the several tasks associated with the recruitment and selection of students.

These skills and/or tasks include:

1. A thorough understanding of the programs offered at the vocational school, employment trends, and job placement.
2. The skill to develop and disseminate information about programs to potential students.
3. The development of inservice activities with feeder school counselors in a way that will assure all students having access to vocational program information.
4. The institution of follow-through procedures to insure proper application being made for program enrollment and placement in the program.

Usually, the supervisor of the Guidance or Pupil Personnel program in the vocational school will have the primary responsibility for carrying out the tasks outlined above. This person deserves to have a clear understanding of the Board of Education policies with regard to member school relationships, especially in regard to activities carried on in enrolling students in the vocational school program. The director needs to convey these policies as well as the administrative practices to which the vocational school and member schools have agreed, so that an effective relationship for bringing member school students into the vocational school can be established and maintained.

The life blood of a vocational school resides in the capability of the vocational school to attract students of a broad range of ability, ethnic background, and other differences common to students in the secondary school. Special attention must be given to assure male and female students that they are eligible to apply for programs not traditional to their sex. The director must monitor all activities and be prepared to play a supportive role to the staff member or members who have the primary responsibility for recruitment and selection of students. It is important that he or she becomes involved in evaluating the activities associated with bringing the students into the vocational school and in reviewing the literature which is used to make certain that it is attractive and accurate, not sex biased, and clearly written. The director should be constantly alert to new and unique approaches which may need to be implemented.

The director can play an important role in cultivating the proper climate for having full access to students and staff in the member or feeder school by virtue of the professional, as well as working relationships among school principals.

The selection and/or placement of students in vocational programs demands the full attention of the director. If the school operates from the philosophical base that most students applying for admission are entitled to be enrolled, even though in programs other than their first choice, then it is inevitable that a multi-lateral involvement will occur among the JVS staff, member or feeder school staff, students, parents, and occasionally an outside agency that may be providing services to the student.[1] It is imperative that the director make sure that the policy structure exists that will provide for prompt and educationally sound resolution to the placement of students in appropriate vocational training programs.

In connection with the initial placement and

selection of students for programs, the director must be assured that established procedures are in place and operating that will respond to students who request change of program or return to the member school immediately following the opening of the school year at the vocational school.

Monitoring all types of relationships with the member schools and parents, especially as they relate to program choice and placement, is important if the director is to fulfill his or her share of the role of maintaining the integrity of the vocational programs and the public relations of the school in the community.

PUPIL ACCOUNTING

The establishment, maintenance and evaluation of school attendance policies and procedures deserve the ongoing attention of the director in the task of supervising persons assigned the primary responsibility for student attendance.

Whether or not the vocational school maintains the official permanent record of the student, the school has the responsibility for developing and enforcing policies with regard to regular attendance. The school leadership must be satisfied that attendance records are properly maintained and reported to the member school, parents and other agencies as appropriate.

Vocational classes in Ohio have established a good record in the attendance of students in vocational programs. One of the compelling reasons for this fact lies in the emphasis that the vocational school leadership, including the Director, has placed on attendance since 1965, when a major expansion was begun in vocational education in Ohio.

The Director, in concert with the Superintendent and other supervisory personnel in the school, must be assured that a plan for dealing with pupil absence and tardiness is in place. It is important that teachers have a voice in deciding upon a plan and their own part in the plan's operation needs to be clearly understood. It is an aspect of the school organization that can succeed only if all participants are fully aware of their responsibility in the implementation of the plan.

The Director's task will be to see to it that there are credible procedures available that provide for proper reporting of student absences and tardiness. Provision must be made for bringing together the information in such a way that it can be disseminated to staff, parents, member schools and others, as well as a means of following up with parents or other agencies in an effort to correct attendance and tardiness problems.

Many schools have access to data processing equipment and, therefore, develop fairly sophisticated systems of pupil accounting. Some schools may be able to incorporate their pupil accounting records into their Data Processing vocational program instruction, while others may use more conventional means of hand recording data. The Director's responsibility will always be that of making certain that a plan is in effect that responds to the policies set up by the district and to evaluate the operation of the plan by carefully reviewing reports and, of course, to see to it that all persons involved in the proper operation of the plan are fulfilling their tasks. In most instances this will begin with the teacher in reporting and in whatever follow-up procedures are included in the plan.

The Director should always feel the freedom to communicate with the Superintendent when he/she notes deficiencies in policies and procedures that may have been promulgated.

Depending upon the locale of the vocational program, that is, comprehensive school or joint vocational school, the director has a key responsibility to see that a clear understanding exists among other agencies that may assist the school in following up on attendance problems. Persons or agencies which may have responsibility and with whom the school may work are:

1. City attendance officers.
2. County attendance officers.
3. Social workers.
4. Welfare Department and/or Children's Services having responsibility for foster home students.
5. Responsible persons in group homes.
6. Probation and law enforcement agencies.
7. Social workers with health and/or mental health agencies.
8. Other agencies which may be unique to the community.

The situation in any given community may vary with regard to the person in the school system that will confirm and maintain an understanding and working relationship with the above mentioned persons and agencies. The director will make certain that his/her office is always available to maintain and strengthen the working relationship with these groups.

Failure to pursue good pupil accounting (attendance and tardiness) procedures will impair the image and credibility of vocational education. The Director should see himself/herself in a monitoring role, once it has been ascertained that a workable plan has been provided and it has been made known to one and all the importance of each staff member fulfilling their responsibility in the plan.

While less and less is heard of "in loco parentis" the school dare not fail in their continuing efforts to make certain that young people who are supposed to be at school are there unless accounted for by parents. Even with the involvement of parents, the school may need to pursue the problem of non-attendance.

PUPIL CENSUS

The Director shares the responsibility for making certain that provisions are made for the maintenance of accurate enrollment records and the information with regard to potential enrollees is kept up to date.

The Director should initially assist in the development of a system which will efficiently provide for the recording of the essential information about each student that is enrolled in vocational programs. The size of the institution and the availability of Data Processing services may determine how enrollment records are maintained. However, the Director needs to have a means of knowing that the system is working. He or she must be assured that the persons directly responsible are knowledgeable in gathering and filing of the information about students enrolled in the programs so that proper reporting to all parties as stated above may be made efficiently and accurately.

Pupil census data should provide for prompt retrieval when information is needed. The Director needs to evaluate the system to be assured that this provision has been made. Recognizing that changes in class assignment, as well as withdrawals and new admissions, may occur with some frequency, especially at the beginning of the year and occasionally throughout the year, the Director needs to be assured that an effective system is in place to accommodate such needs.

PUPIL POLICIES, RULES AND REGULATIONS

The Board of Education is responsible for developing policies that will provide for the effective operation of the vocational program offerings. Policies generally fall into two major categories:

1. Those that are mandated by legislative enactment; and,
2. Those deemed necessary for the orderly operation of the vocational program.

The superintendent, as chief executive officer for the Board of Education, has the responsibility for giving leadership that will assure that policies are adopted that respond to Federal and State law. However, he or she will need to depend upon the director to determine additional policies relating directly to the operation of the vocational programs.

The director, in cooperation with other staff members should continually evaluate the policies which are in place so that there will be a clear understanding on the part of all staff members with regard to the implementation of the policy as it relates to the operation of the school.

Rules and regulations may, in some instances, be developed and adopted by the Board of Education as a part of the policy. While in other cases, the director and supervisory staff, in counsel with other staff members, may recommend rules and procedures to the Superintendent and thence to the Board of Education for adoption. Either procedure can work well.

The director needs to play a key role in sharing with the staff the distinction between regulations, rules, and policies, as interpreted by their particular system. In many instances, the director will be called upon to develop and/or revise rules and regulations which are for implementing a broad policy position adopted by the Board of Education. The director must have a close working relationship with the superintendent. He or she will also need to have a good understanding of the intent of policy as he or she shares in the promulgation of rules and regulations which then will require enforcement.

School discipline procedures, attendance, and a great many other rules and/or regulations usually are reviewed annually by the director and other staff members under his or her direction. Frequently they may recommend changes to respond to needs as may arise during the school year. Usually, these are recommended to the Board of Education by the superintendent and such additions or revisions become a part of the Board's policy position.

It is highly important that the director, in working with staff members, makes certain that all policies, other than those mandated by law, are necessary and, if necessary, that they accomplish the expressed objectives.

MOTIVATION OF ATTENDANCE AND PUNCTUALITY

The desire of the student to be in attendance and punctual for class, like the desire to learn, must come ultimately from the student. While there are legal requirements for school age students to be in class and, realistically, this may be the compelling reason for some students to be in school, the school must seek to instill more desirable and productive reasons for attendance.

A good argument can be made for the fact that students will want to be in attendance in a class where they are convinced that things are happening that will be of benefit to them. Good attendance patterns and punctuality are a product of many thrusts, not the least of which is, of course, effective instruction and well developed and managed classroom procedures.

The Director, working with the Superintendent, and key staff members must determine that appropriate school policies are in place that respond not only to the requirements of the law, but also to the school situation. Such policy takes into account the unique relationships that may evolve between the vocational school and the member or feeder school so that there will be no confusion regarding the responsibility for attendance and follow-up procedures. In spite of having well written regulations and procedures for implementing the policies, there is likely to be a continuing need for the Director to evaluate the practices in effect to insure that the best interests of the student and school are served.

The Director has the basic responsibility to present a rationale to supervisory and instructional staff that will inspire them to use known psychological principles and techniques which will encourage attendance and punctuality. Creativity on the part of the Director in sensitizing all staff members to the importance of good attendance is an important aspect of a successful program. The Director may wish to suggest the importance of good role models on the part of the staff and of using prominent business and industrial personnel people, as well as other ways of stimulating good attendance.

Punitive measures may have to be included as a means of motivating students to be in attendance. However, most would agree that it is not one of the more effective ways to inspire students to want to be in class. It would, in fact, have to be viewed as counter-productive to suspend students for failing to be in attendance or to be punctual.

The Director dare not lose sight of the fact that his position requires that he or she develop a priority on all the options available for maintaining attendance. It is clear that good classroom instruction, fair and consistent policies and procedures, and a good understanding of the importance of attendance and punctuality among students, parents and other involved agencies will contribute to optimum learning. Vocational education has much at stake in developing positive attitudes toward attendance and punctuality since success in the work world demands good performance in these areas.

COOPERATIVE RELATIONS IN GUIDANCE AND COUNSELING OF STUDENTS

Effective guidance and counseling programs are dependent on an adequate understanding of the role of all staff members. There is a definite interdependence among administrative and supervisory personnel, guidance and counseling staff, and instructional staff. The director is a key person in defining the role of each of these groups in order that they may work together in a complementary manner.

Professionally trained counselors can assist students in resolving personal problems which may be interfering with their performance in school. These problems, more often than not, are manifest in the classroom and ultimately find their way to supervisory and/or administrative staff members. The admission of students to vocational programs usually will find these three staff groups involved to some degree. Problems associated with students desiring to change or drop programs has wide ramifications for the need for a close and clear working relationship among the same three groups if the student's best interests are to be served. The mandate is clear so far as the director is concerned in that he must make certain that decisions are not made in the absence of proper communication. Also, procedures that have been agreed upon in dealing with the all too familiar problems which may arise in the accommodation of students in the vocational school should be followed.

Inevitably, the director will find that he or she will have to serve as a mediator in certain types of problems which present themselves. This situation is more likely to occur when the organizational pattern is "settling in." At this time, it is particularly important that the director work closely with supervisors, counselors, and staff, to the extent that they understand that the school exists to serve the students, and that each member of the group has a contribution to make in that regard. Teachers need to understand their limitations in the classroom and to develop confidence in the counseling staff. Counselors, too, must recognize their limitations as well as the need to work closely

with staff members, to share appropriate information with them, and frequently, to solicit the assistance of supervisors and instructors.[2]

In the case of vocational schools which accept students from member or feeder high schools, the cooperative relations in the Guidance and Counseling program will need to extend beyond the vocational school itself. The director, as he/she does in other vocational school-member school relationships, needs to share in the development of an understanding of the role of the member or feeder school counselor in the referral of students to the vocational center. These understandings will, of course, include the relationship between the vocational school counseling staff and the member school personnel. Generally, the director should arrange with the member school principal definitive guidelines that will serve the schools and their counselors as they carry on career education activities, as well as the direct referral of students for enrollment in programs.

DISCIPLINE

Discipline As A Function Of School Climate

Student behavior is a serious concern of boards of education, superintendents, directors, and other staff members. Public surveys usually reveal that student discipline, or lack thereof, is near the top of the list of issues which the public feels are problems in the school.[3]

It is a tempting over-simplification to suggest that if fair and consistent policies and procedures are in place and enforced, if good instruction is taking place, then there will be fewer discipline problems. As pointed out in Series #11 of the *Heart of Instruction Series*[4] these factors can and do contribute to more acceptable student behavior. The director, as instructional and operational leader, must be sensitive to the relationship of discipline to the total school learning atmosphere. Continued acts of vandalism and other negative behaviors obviously require the attention of the director, who can endeavor to determine the connection between such acts and the school's instructional and operational responsibilities. Knowing at what point there needs to be a change in policy or staff assignment, or to exercise other options available, is one of the skills that the competent director must have or develop.

Recognizing that good discipline is inevitably a product of effective instruction and good classroom management, the director should make certain that all instructors, and especially those that are new or experiencing discipline problems, have access to inservice activities using the appropriate sections of Series #11 of the *Heart of Instruction* -- "The Techniques of School and Classroom Discipline."[5]

Relationship To Individual Student Problems

Individual student discipline problems deserve the involvement of the director to the degree that he/she is assured that such attention is given to arriving at the most appropriate resolution. He or she must be satisfied that supervisors and/or counselors, who may be working with the classroom teacher and students, are equipped to counsel and advise with the view to reaching the best solution. The director should have the assurance that other avenues of assistance are open, both within the school and from outside agencies, that may be needed in providing resolution to the problem.

Parents, member school staff, welfare, and legal agencies, may separately or collectively be requested to share in working with the school and the individual discipline problem. The director's goal must be to insure that the student is receiving fair and consistent treatment within the policies and procedures of the school. This is not always an easy task when one considers the pressures which may impinge upon staff members and, thus, the possible overreaction to particular acts.

The director, along with the superintendent, must be assured that legal provisions are observed in dealing with each student as there may be a need to hold due process hearings and take other steps as required by law. There is no way that directors dare allow themselves to be divorced from the knowledge of behavior problems among the students. Such problems are so closely interwoven with the instructional program and with the overall management of the school that to do this would diminish the director's credibility in the eyes of the instructional staff as he/she attempts to assist them with their instructional activities.

CUMULATIVE RECORDS AND THEIR USE

Directors may be working in one of two settings with regard to cumulative records. Directors who are serving in a comprehensive high school or in large city vocational schools may be in a situation where cumulative records include all of the test data, grades and other information as determined by the school and to be kept in the cumulative file. In other situations, the director may be serving in joint vocational school districts where the only records maintained at the vocational school are those that are forwarded to the school for purposes of enrollment or program placement and attendance, grade, and other information accumulated at the vocational school. The director should share the responsibility as outlined by the superintendent and as determined by board policy to be certain that procedures are followed in collecting and maintaining information for the student file. In the case of the comprehensive school, this will be the official student file. In the joint vocational school, the file will be primarily for use at the vocational school and then transmitted to the member school for maintenance in their files on an official basis. Regardless of whether or not the file is regarded as the official file, the director will want to be assured that procedures are in effect to protect the confidentiality of student records as required by law.

The use of cumulative records must be directed toward the best interests of the student. The director will share and give direction to the determination of which information transmitted by the feeder school is pertinent in terms of placement in the vocational classes. He or she should maintain a close working relationship with the guidance and counseling personnel in determining what information should be collected and maintained in the best interest of the student and his parents. As stated before, the director in the JVS setting should work with the counseling staff and with their member school counterparts in determining information which will be collected and transferred to the member school. Frequently, the type of information collected will be decided by the involvement of other agencies in working with young people. Medical and psychological information may be important for students in order for them to be eligible for the services of the Bureau of Vocational Rehabilitation. Welfare agencies may need information relative to foster home placement and to the need for financial assistance, and law enforcement agencies may request specific information about students. Progress reports which reflect the progress students have made in their instructional program, as well as in their on-the-job training, may be requested by potential employers and may be released on approval of the student and/or parent. The director should share in initiating the appropriate policies and procedures and he or she should further continue to evaluate information maintained in order that it, as stated before, may serve the student in the achievement of his/her goals.

USE OF COMMUNITY AGENCIES FOR PROVISION OF PUPIL PERSONNEL SERVICES

Vocational educators, under the leadership of the Division of Vocational Education, Ohio State Department of Education, have taken the leadership in utilizing community agencies in supporting the goal of achievement of students enrolled in vocational education. Most directors, through inservice activites, have been sensitized to the opportunities for community support through these agencies. Many vocational schools are using the services of as many as forty (40)[6] or more agencies in assisting students enrolled in vocational programs. Directors, under the direction of the superintendent and within the policies of the school, must share in taking the initiative in establishing liaison with community agencies which are established by law or by voluntary effort to provide social, economic, health, welfare, and numerous other services to families or individuals.

One of the first tasks of the director is to identify staff personnel who will establish a liaison with the various community agencies. While the director may wish to establish some contacts on his/her own initiative, e.g., the court system, he/she will usually need to turn to the supervisory or counseling staff to establish these contacts. The director should determine that appropriate contacts are made and that ample opportunity is made for the agencies to fully explain their services and to understand the school's mission in training young people. He or she should not hesitate to turn to the superintendent for assistance where philosophical differences may seem to interfere with the delivery of services to the students.

The broad category of agencies includes those working the health and welfare field represented by the Bureau of Vocational Rehabilitation, the county welfare departments, the county Children's Services, and the psychological services available in the various communities. Another grouping of services would include those in the social-economic area which would encompass the Ohio Bureau of

Employment Services, Legal Aid Society, Planned Parenthood and others. Directors should be assured that their staff members are aware of the broad range of services which are available in a community. Most communities have directories available identifying the agencies and the services available.

Appropriate screening procedures must be in place in all vocational schools. Directors will need to monitor the operation of whatever procedures are to be followed in identifying students who need and are eligible for services apart from those provided at school.

Following through on referrals to agencies requires a firm commitment on the part of school personnel. The director will need to involve himself/herself in this aspect of community agency relationship. It is for this reason that specific staff individuals should be identified in working with particular agencies in order that the lines of communication are clear and open.

KNOWLEDGE OF STATE AND FEDERAL EMPLOYMENT LAWS AND REGULATIONS

A knowledge of State and Federal employment laws and regulations is of unique significance to the vocational school staff. In view of the changes in minimum wage standards, as well as modifications in the female and child labor laws, it is imperative that the director keep informed through the superintendent and other channels of information regarding the current status of such laws. Vocational cooperative program coordinators, as well as other staff members who have responsibilities in connection with placing students in employment, must be kept apprised of employment laws and regulations. Through inservice activities or other means, the director should confirm that all staff members are apprised of the latest information.

In view of the fact that special provisions are made for students enrolled in vocational programs under the labor laws so that they may obtain on-the-job training experience, it is important that staff members responsible for student employment be completely informed so that students may benefit from these provisions. While the director needs to be knowledgeable about all aspects of the State and Federal laws, it is particularly important that he/she delegate responsibility for keeping the staff fully informed so that all training programs are operating at optimum levels.

EVALUATION OF STUDENT PROGRESS

Proper student progress determination is important if students and parents are to be informed about student's performance. Students deserve to know the goals of a specific vocational program and also what progress they are making toward the achievement of these goals.

Vocational instructors starting their teaching career may have had only limited opportunity to study the complexity of the proper measurement of student progress. Even the experienced teachers may find the appraisal of student progress not an easy task, inasmuch as a great many variables present themselves in making both objective and subjective determination of the student's progress and development. The director must provide the professional leadership through supervisors to staff members in order that fair and consistent methods are used to appraise the student's progress. Students' grades are important to the learner, as well as their parents, and they are also of significance to prospective employers who will make a judgment, at least in part, as to the employability of the student.

In some situations the school may have procedures which are definitive in the manner in which the grade is determined. If this is the case, the director has the responsibility to be assured that such procedures are not only fair and consistent, but are also manageable by the staff in making grade assignments.

REPORTING PUPIL PROGRESS

In a Gallup Poll, reported in the *Phi Delta Kappan*,[7] parents evinced a strong preference for greater involvement in their student's performance and related activities.

Vocational schools have an opportunity to take a positive approach in reporting progress to both students and parents. Instead of reporting only failure to perform at some pre-determined level, the vocational school can report progress in areas that may not be reported in traditional classroom programs, e.g., skill development and related studies. The director has the responsibility to oversee a progress reporting system that insures recognition of those students who make progress in skill development, as well as in other programs of study. The director should consider incorporating the following concepts into the progress reporting procedures which are in effect, or which may be put into effect:

1. report progress, as well as the lack thereof.
2. encourage parent and student inquiry regarding reports.
3. be definitive in stating as precisely as possible what the student or parents may do to improve performance.
4. make certain that intervals of reporting are such that parents and/or students have an opportunity to respond before it is too late to make corrections.
5. periodically assess the procedures being followed to determine that the progress reports are being received by the right party

and that they are being properly interpreted.

Obviously, the director will have persons on his or her staff who have primary responsibility in the preparation and dissemination of progress reports. He or she may, however, need to assess carefully the uniformity with which the various program areas of instruction are interpreting and preparing the reports, so that credibility regarding progress reporting is preserved among the recipients.

Inservice work among staff members is necessary if good progress reports are to be developed and disseminated. The director most likely will use committees chosen from among the staff at all responsibility levels to develop the best type of progress report, and to have staff involvement and cooperation in whatever report is used.

Finally, it must be pointed out that progress reports are, in fact, a type of public information activity in which all schools are involved. Particular care needs to be taken that every effort is made to make the progress reports serve as an affirmative activity with respect to the image of the vocational school program in the community.

CLASSIFICATION AND SCHEDULING OF STUDENTS

The direct responsibility of the director in connection with the scheduling and classifying of students will depend on the size and complexity of the system. In the larger joint vocational schools and the comprehensive high schools, the primary responsibility for these tasks will probably be assigned to a member of the administrative team. In the moderate or smaller system, it may fall to the director, along with supportive staff, to bring together sufficient records and information to effect the proper classification and to do the scheduling.

The director's role will include making certain that the proper understandings and procedures are operative between the vocational school and feeder schools, or feeder programs, where students are coming out of other programs in the comprehensive schools. Conceivably, feeder schools may have different bases for classification of students. Therefore, the director will need to make certain that the policy and understanding which is in effect will resolve potential problems in this area.

The director must make certain that efficient and effective means are in place to confirm the following classification criteria:

1. students meet the age requirements for the program for which they are seeking admission.
2. credits earned comply with the standards required for program assignment.
3. other information is provided and reviewed with respect to classification criteria which a school may have in effect.

Scheduling, like the leadership role in other student relation tasks, will call upon the professional expertise of the director to ascertain that students are:

1. given proper notice of their class schedule,
2. assigned in a way that a balance is maintained in terms of numbers among classes, and
3. scheduled appropriately for classes, such as Distributive Education, Occupational Work Experience, with reference to the time of day to be in class.

The availability of computer services may determine whether or not this means of scheduling is used. The director must share in the responsibility for determining the method of scheduling. More often than not, computer services will probably be used. However, the director will need to bring together the data that will determine whether the scheduling can be done on an in-house computer or whether services outside of the school will be used. His or her role as the director may be that of communicating to the superintendent facts that will be necessary in making a decision. This includes cost of the services and their capability to deliver promptly and in compliance with the needs of the school.

RELATIONS WITH STUDENT GROUPS AND VOCATIONAL EDUCATION YOUTH ORGANIZATIONS

All vocational education programs have available related youth organizations which the instructors are encouraged to include as a part of their instructional program. Because participation in the youth organizations is sometimes viewed as extra-curricular and extra work, it becomes the responsibility of the director, working through supervisors and others, to demonstrate how club participation can support and enhance the vocational education instructional programs. The director's position as instructional leader requires that the best talents of persuasion be used to explain the important benefits of leadership and skill development that can accrue to students participating in the many activities of the youth organizations.

Since the director will be working through other staff members in most instances, it is important that he or she help them develop strategies that will demonstrate to instructors the benefits that will come to the teacher as he/she works with young people in all of the activities associated with youth organizations. He/she may need to lend support in getting the proper media exposure for club activities to encourage the program development. The director will also want to use his position to make certain that the superintendent and board are familiar with this aspect of the school's program.

JOB PLACEMENT

One of the measures of vocational program goal fulfillment is the extent to which students are placed on the job. While less obvious benefits may accrue to young people and adults from having taken vocational training, the capability to be placed on a job and to hold a job is the most important potential outcome.

Job placement responsibilities will vary among vocational training situations. A highly structured and organized job placement program with one or more persons devoting full time to the effort may be found in some settings. In other instances, the responsibility of job placement may be shared among instructional staff, supervisors, with coordination for the efforts being directed from the Student Services office, or other designated persons. There is much to be said for involving as many of the staff as possible in job placement, since teachers in particular are in a unique position to assist in the placement of students on jobs which are commensurate with the student's ability to perform.

The director's role is determined by the organizational structure and the job placement policy of the vocational education planning district. However, the director should always involve himself or herself to the extent that he or she is assured that appropriate job placement efforts are in place. In most instances, the director will:

1. ascertain that each staff member, e.g., instructors, supervisors, and others who may be involved, have well defined responsibilities in job placement.
2. see that effective coordination of all job placement efforts is being done as assigned.
3. share with the superintendent the responsibility for inviting the services of other agencies, such as the employment service, and the Bureau of Vocational Rehabilitation, in job placement, and
4. make certain that follow up and placement data are properly maintained for the purpose of evaluating local programs, as well as for reporting purposes.

In a number of situations, employment service personnel are being provided to the vocational school program for purposes of job development and placement. The director has a key responsibility in making certain that the person assigned to the facility has access to information which he/she may need, and that his/her efforts are integrated into the vocational school's program to the extent that the employment service operation allows. The director will need to be alert to ways of coordinating the services of other agencies which may have an interest in the satisfactory placement of young people in jobs, but that are not ordinarily associated with job placement tasks. For example, social workers with the Health and Welfare Services have an interest in stabilizing the home and the family income and, therefore, may play a role in assisting the school.

There is always a need to review the employment patterns and to view the larger community picture from the standpoint of trends that may emerge because of new industry, or industry which may be phasing out or whose job skill demands are changing. They will be reflected sooner or later in job placement and, therefore, the director should be in tune with the impact of these factors, and be prepared to make appropriate recommendations for adjustment in program and curriculum.

FOLLOW-UP

Quality control takes various forms in manufacturing a product and industry attaches a great deal of significance to the effectiveness of their production performance as indicated by these measures. In the education field, objective criteria for measuring the "quality" of the product are difficult to come by. Follow-up procedures provide the best means of learning about the effectiveness of the training program and the capability of the student to survive on the job.

The director must assume responsibility for bringing together staff personnel, as well as outside resource persons, to determine the kind of follow-up information which will be most helpful in:

1. determining the rate of job placement with the attendant information about the type of work, location, salary, and other related information, and
2. determining the effectiveness of the training program that will provide a means of keeping abreast of developments in the job market that will return information to the school over a long range period and provide information that will assist in the program management.

Follow-up is never a simple or easy task. People must be involved who have a research orientation in order that the data collected have the potential for being significant. A great deal of coordination among other persons who must be involved in the follow-up work is required. The determination of who is to be followed up, gathering of current address lists, and the preparation of materials that will stimulate response are all a part of the complex job of doing follow-up work. The director will have to feel the

freedom to use outside personnel under some circumstances to insure that the quality of this effort justifies the expense. Many kinds of follow-up information can be derived through internal school resources, that is, staff members may be called upon to obtain information from students who have recently graduated. This holds the additional advantage of keeping in touch with students, and assuring the students of the school's continued interest in their progress.

Follow-up efforts also may provide a means of encouraging graduates to return to the vocational school program for job upgrading, as well as apprentice courses and other types of adult or continuing education made available to the community.

IMPLICATIONS OF SEX EQUITY FOR GUIDANCE AND COUNSELING

Comparison of Occupational Status for Women and Men

In spite of increases in their educational attainment, women are still far from achieving equality in terms of occupational status. *The Manpower Report of the President* (1975) indicated that:

> Despite these trends in the education of women, many educational traditions reinforce the stereotyping of male-female job roles. In vocational and technical secondary school courses, for example, girls are concentrated in business and commercial courses (which are 79 percent female), and in health courses (95 percent female), while boys form a vast majority (98 percent) of those taking technical, industrial, and trade subjects.[8]

As a group, women are still concentrated in the lower paying, traditional female occupations and industries.

The Department of Labor reported in the *1969 Handbook of Women Workers*[9] that women were concentrated in a relatively small number of occupations as compared to men. Half of all female workers were employed in only 21 occupations in contrast to half of all male workers in 65 occupations. The *1975 Handbook of Women Workers*[10] reported that two-fifths of all women workers were employed in ten occupations—secretary, retail trade salesworker, bookkeeper, private household worker, elementary school teacher, waitress, typist, cashier, sewer and stitcher, and registered nurse.

The *1975 Handbook* stated that in 1973, women accounted for two-fifths of all professional and technical workers, with teaching continuing to be by far the largest professional occupation for women. Forty-three percent of these women were employed as teachers in non-college settings in 1973. The health field employed the second largest group of professional women, with registered nurse being the most common occupation. In professional jobs other than teaching and the health fields, however, women accounted for only about one-fifth of professional and technical workers. Even in the traditional female professions, women continue to be under-represented in the upper-level, senior positions.[11]

Although women predominate in the teaching ranks of public education, men predominate at the decision-making levels. In fact, despite emphasis on equal employment opportunities during the past ten years, the percentage of women in educational administration has been declining. Howard (1975) documented this decline reporting that in 1972-1973, only 13.9 percent of the nation's principals were female, while in 1960, 37 percent were female. The number of superintendents also declined from 90 to 65 over the decade from 1965-1975.[12]

Ohio Goals for Improving Sex Equity in Vocational Education

Student personnel services have a responsibility to take overt steps in eliminating sex discrimination, sex bias, and sex stereotyping, in guidance and counseling relations with students.

The following goals are the Sex Equity Assurances prescribed by the Ohio Division of Vocational Education Planning District (VEPD).

1. Enrollment patterns in all vocational education programs which have 80 percent or more enrollment of one sex will be examined for indicators of sex bias, sex discrimination, and sex stereotyping.
2. Recruitment and descriptive information about vocational education programs will have statements that the program is available to all persons regardless of sex.
3. Effective action will be taken toward recruiting both males and females into programs dominated by members of one sex.
4. Positive action will be taken by counselors in the State to eliminate sex bias and sex stereotyping in student selection of vocational education courses or career-decision making.
5. Administration, guidance, and instructional personnel will receive training in procedures and strategies in overcoming sex stereotyping and sex bias.

6. Job information about the program will emphasize career opportunities for males and females.
7. Cooperative and work experience programs will make agreement only with those employers who do not discriminate against employees on the basis of race, sex, or other discriminatory criteria.

SUMMARY

A conscientious director of a vocational education program in the state of Ohio would have every right to observe that he has a responsible position because he/she seems to be responsible for everything that happens. In the leadership role for student personnel relations, he or she has the important task of making certain of the proper implementation of the many policies, procedures, and services which bear upon students. It has been suggested throughout this chapter that his/her activities may center around assessing or monitoring the way in which the vocational program is responding to the many needs of young people—and this may be the director's primary task. The director's capability to integrate into this personal information system data about the many aspects of personnel relations—and his response to that data—will determine his/her success in meeting the needs of the student.

ENDNOTES

1. *Program Description for Pupil Personnel Services*—Ohio Department of Education. February 1978.

2. *Introduction to Educational Administration* - Fifth Edition - Campbell, Bridges & Neistrand - Allyn & Bacon - Page 245 - Copyright 1977.

3. *Phi Delta Kappan* - September 1978. *The 10th Annual Gallup Poll of the Public's Attitude Toward the Public Schools:* by George H. Gallup - page 33.

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6. *Program Description for Pupil Personnel Services* - Ohio Department of Education - Penta County Joint Vocational School and Skill Center, February 1978.

7. *Phi Delta Kappan* - September 1978. *The 10th Annual Gallup Poll of the Public's Attitude Toward the Public Schools:* by George H. Gallup - page 33.

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Dr. Leonard D. Kingsley

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Previously, he served as supervisor of counseling for three years and as vocational agriculture instructor for five years in Berne High School, Indiana.

Prior to that, he was a vocational agriculture instructor for seven years in Brighton High School and Avilla High School in Indiana.

He provided technical assistance in vocational education in Indonesia 1955-1958 and worked at product procurement for the Kraft Foods Company in Chicago 1946-1949.

He received his B.S degree in vocational agriculture at Purdue University, his M.A. degree in guidance and counseling at Ball State University, and his Ed.D. degree in administration and supervision at The University of Toledo.

CHAPTER VII

EVALUATIVE SELECTION AND USE OF INSTRUCTIONAL RESOURCES

Lloyd W. Dull

Assuring the proper selection and use of instructional resources is a very important responsibility for supervisors. Many problems are presented to supervisors and teachers today because of the rapidly accelerating rate at which instructional materials of great variety are developing.

The problem is further complicated by diminishing budgets for instructional materials and equipment. We seem to be like a thirsty person with only a thimble to drink water from when located next to a fresh water lake. Wonderful instructional materials and excellent equipment are available, but shortages of funds limit the purchasing of them. This problem challenges us to be extremely accountable in our selection process.

The selection of instructional materials should take place as a result of cooperative action by all who are affected by them. In some cases, it will include students and members of the community. The selection should be based on the criteria developed by the selection committee. The selection process should be scientific in manner, that is on the basis of a very systematic analysis of the books, learning supplies, or equipment to be chosen. The selection committee should seek to get some feedback on varied resources from all potential teacher users. It also should have conference study sessions with consulting experts.

Provision of adequate, good quality instructional resources to teachers does much to raise their morale and influence them to feel administratively supported. Of course, one would not think of having an army of soldiers supplied with inadequate and obsolete rifles, guns, ammunition, and other military equipment and supplies. Yet, in too many school situations today there are teachers working with obsolete textbooks, inadequate supplementary books and library resources, poor audio-visual software and hardware, and obsolete instructional equipment.

Here we shall discuss the ways supervisors can work in a leadership capacity with teachers, and also often with lay citizens and students, in continuous evaluative study in the selection and use of all kinds of instructional resources.

The vast variety of instructional resources can be organized into six categories. They are: (1) printed materials, (2) educational technology, (3) instructional equipment, (4) community resources, (5) school district professional resources, and (6) school building facility resources.

When dealing with the topic of selection and use of instructional resources in the past, most textbooks on supervision have concentrated almost entirely on printed materials. While printed materials are very important for teaching and learning, they are limited in their potentiality for deriving achievement of learning by all students. In fact, we take the position in this chapter that the current reservoir of educational technology, community resources, and local school district professional resources offer great potentiality for improving teaching and learning. If we are to successfully meet the differences in learning abilities and modes of all students, we must make more use of these additional resources.

We particularly recommend much more use of community resources in instruction. We believe that evaluative selection and use of community resources will make student learning more exciting, meaningful, and relevant. Education, to be significant, ought to be meaningful and purposeful.

Community people, and the rich material resources in most communities, provide an excellent resource bank for career education, which ought to be integrated within the general curriculum of every grade level from kindergarten through grade twelve. Supervisors, working with teachers and community people, need to unleash and harness the use of this inadequately tapped storehouse for educational growth of all students.

Furthermore, when community people are more meaningfully involved in education in schools—as resource helpers of teachers—they are likely to be more interested also in the financial stability and success of schools and education. While the superintendent is chiefly responsible for maintaining a stable, solvent school district, supervisors must have an interest in the stability because quality instruction cannot be provided in an unstable situation.

INSTRUCTIONAL TASK ANALYSIS

The place to start toward making effective use of instructional resources is through carrying out an instructional task analysis. A task analysis asks these basic questions: 1) What is to be taught? 2)

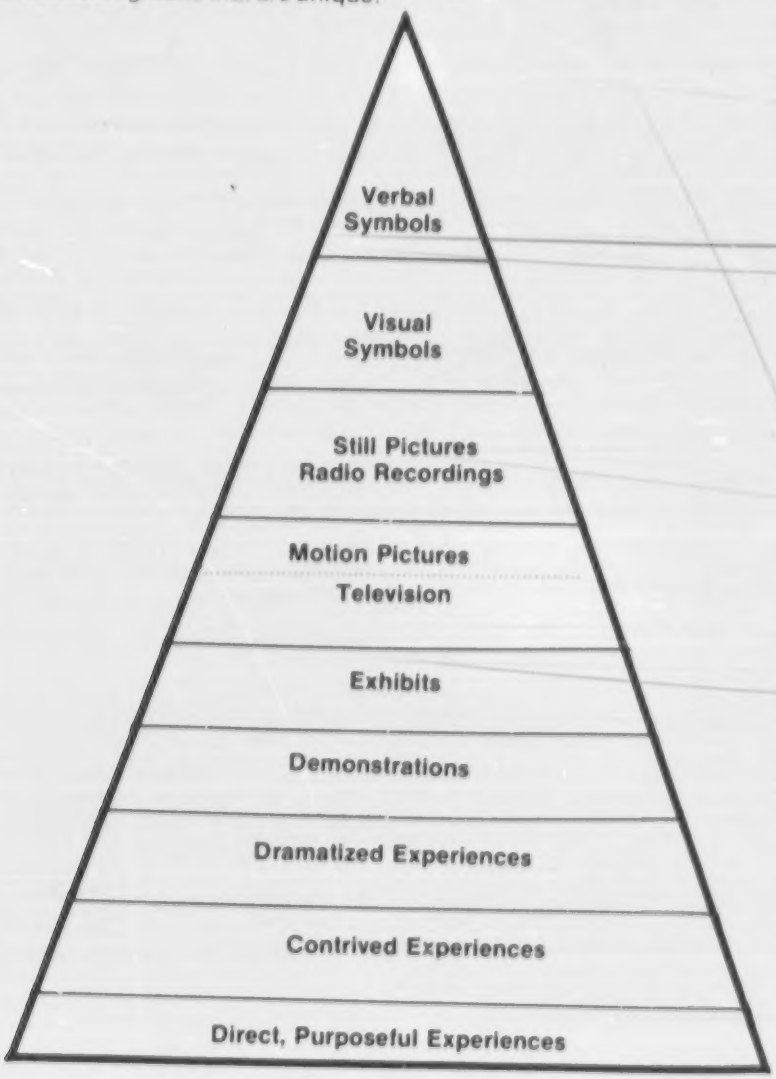
How is it to be accomplished? 3) When is it to be taught? and 4) Who is to receive the instruction? For the teacher, this analysis of tasks means specifying what skills are to be taught, blocking out a time frame for accomplishing those skills, sequencing the skills from simple to complex, and selecting the proper resources to provide as thorough and efficient a learning experience as possible for the student.[1]

The first step in a task analysis, or preparing for instruction, is to determine what is to be taught. Once this is decided, one-third of the problem of determining effective instructional resources has been answered. "What to teach" means what skills are to be taught and the degree of proficiency that is to be achieved by the students.

The second step in a task analysis is to determine how to "package and present" the skills that have been selected. This doesn't mean there is one best way to present the lesson. Each teacher has personality and teaching traits that are unique. What is meant is that once the skills are selected, the next job is to write the skill in a behavioral objective format that defines the behavior to be learned and the degree and conditions that are to be employed. The wise teacher will quickly assess what curricular resources are available and write the criteria and conditions of the objective to meet those resources. This is making instructional resources work for you.

The third step in a task analysis is to determine the characteristics of the students. From a practical standpoint, this means knowing in a general way whether the students are gifted, slow, or represent a broad cross-section of abilities. It means recognizing that the more difficult the task, the more concrete experience is necessary, with plenty of practice time.

Edgar Dale years ago combined all these ideas into what he called, "Cone of Experience." This graphic cone is provided below.[2]



Dale states that all resources are effective, but with slower students, the instructional resources at the bottom of the cone are usually the best methods to employ. Probably the best way to be sure a skill or lesson is "getting across" to the students is to employ several resources for any objective. Knowing your students and providing a number of matching resources is another way of making instructional resources work for you.

The final job in task analysis requires the teacher to select the order in which the skills are to be taught. Obviously, this means selecting the order in which the resources will be used.

Building on Dale's idea of using concrete and direct student involvement with resources first, followed by increasingly more abstract or nondirect student involvement, is sound teaching-learning practice.

Getting enmeshed in freight rates and cost-billing theory in a transportation class before learning about the function and use of a "weigh bill" is putting the proverbial cart before the horse. The proper resource must fit in time and place to the objective and the ability of the pupils. This is doubly true if the students are slow learners. So, "when" to teach means starting with simple, concrete, student-manipulated resources and gradually moving up the "Cone of Experience" to abstract or non-manipulative resources such as textbooks. But it is also necessary to provide a variety of resources for a given objective or lesson.

To make instructional resources effectively work for you, the teacher must know when to use them to best advantage. Below we have a listing of the variety of instructional resources available for use by teachers. These resources are classified into six categories with a sampling of specific resources under each category heading.

1. Printed Materials

   - Textbooks
   - Workbooks
   - Supplementary books
   - Tradebooks
   - Reference books, e.g., dictionary, encyclopedia
   - Pamphlets
   - Periodicals
   - Newspapers
   - Bulletins
   - Other

2. Educational Technology

   - Television
   - Radio
   - Video tape
   - Movie projector and films
   - Filmstrip projector and filmstrips
   - Record player and records
   - Tape recorder and tapes
   - Sound filmstrip and projector
   - Cassette players and cassettes
   - Overhead projector and transparencies
   - Opaque projector
   - Luminating press and pictures
   - Cameras and pictures
   - Other

3. Community Resources

   - Resource speakers
   - Field trips
   - Advisory committees
   - Industry and business learning experiences
   - Work experiences
   - Other

4. Instructional Equipment

   - Sewing machine
   - Gas or electric stove
   - Refrigerator
   - Typewriter
   - Calculator
   - Microscope
   - Telescope
   - Modern language laboratory equipment
   - Drill press
   - Lathe
   - Reading pacer
   - Computer
   - Other

5. School Professional Resources

   - Principal and assistant principal
   - Counselor
   - Librarian
   - Audio-visual technician
   - Psychologist
   - School nurse
   - Central office administrators
   - Other teachers
   - Other

6. School Building Facility Resources

   - Chalkboards
   - Bulletin boards
   - Classroom furniture
   - Gymnasium
   - Auditorium and stage
   - Public address system
   - Athletic field
   - Tennis courts
   - Other

This chapter is expected to concentrate on the selection and use of instructional resources. Dale's "Cone of Experience" has been dealt with here in order to show where these instructional resources fit into the teaching-learning context from the total resources point of view.

As discussed earlier, the selection of a given set of resources *depends upon the objective, the type of student* and *level of difficulty of a given task*. The objective and level of difficulty largely dictate which instructional resource will be most effective.

INSTRUCTIONAL MATERIALS AND THEIR USES

Below is a list of resources, chiefly of a printed nature, with brief information about unique characteristics of each. This list is commonly referred to as "software" in media jargon. Books, periodicals, and resources relying on printed material fall within this category.

Printed Materials

A. Textbooks

Purpose: Provides data transmission, explains, and may motivate.
Skill: Reading only.
Drawback: Students limited to a passive role, and reading must at some point be matched with ***doing.***

B. Tradebooks

Purpose: Provides a more in-depth look at a topic than a textbook. Also, it reinforces the validity of the task because it suggests that other "real people" can and do perform the skill.
Skill: Reading only.
Drawback: As with a textbook, students are limited to a passive role.

Note: When students are slow or task is difficult, textbooks or tradebooks have limited use unless combined with concrete experiences.

C. Pamphlets

Purpose: Motivator or advanced organizers used to sell a skill or product.
Skill: Reading.
Drawback: Value is in motivation.

D. Periodicals

Purpose: To provide timely in-depth, specialized information on a topic. Excellent for research or advanced study on a topic.
Skill: Reading.
Drawback: Class or individual must be able to comprehend and apply the information from such a source. Slower students would probably not find this resource useful unless a good deal of verbal explanation and "hands on" experience were also provided.

E. Newspapers

Purpose: To report new information on a topic in brief form.
Skill: Reading.
Drawback: The brief nature of the article.

F. Others

In recent years, a number of newer resources that rely on the printed word, but may use other resource techniques, have come into vogue. These are:

1. Programmed Learning

Purpose: Transmit information, elicit individual student response, promote self pacing, by constant repetition.
Skill: Reading or listening or both.
Drawback: Can become boring, and slower students require close teacher supervision. At some point, group instruction or sharing of ideas is necessary.

2. Learning—Activity Packages

a. Contract activity package

Purpose: Allows for student self-pacing of learning through a form of contract reinforcing the idea of self-responsibility.

Skill: Self-directed and responsibility in learning.

Drawback: Requires a degree of maturity and self-direction on the student's part.

3. Tutorial

Purpose: Step-by-step remediation of persistent learning difficulties.

Skill: Accomplishment in a learning situation.

Drawback: Extremely time consuming.

Note: This resource doesn't necessarily rely on printed materials, but if visuals or one-to-one questioning takes place to help the student comprehend the lesson, the posttest must either use printed materials and/or ask the student to perform a specific concrete skill so that the instructor can be reasonably sure the student comprehends and can apply the information given during the tutorial session(s).

4. Experiments

a. Structured

Purpose: To illustrate processes.

Skill: Recall, extrapolate.

Drawback: Memorize results rather than understand processes.

b. Unstructured

Purpose: To stimulate hypothesis formulation.

Skill: Initiating ideas and manipulating apparatus.

Drawback: Very hard for student to originate an experiment, may just plagiarize.

Note: This resource always requires careful preparation and ample use of printed materials.

5. Simulation Games

Purpose: Student Involvement.

Skill: Use wits, take risks, play a role.

Drawback: Time consuming, may spend all the time in game and none in relating the game to the concept to be learned.

Note: It may appear typical to include group process and seminars as resources. Remembering that resources are a tool to help achieve an objective legalizes their use. As an added justification, they belong with printed or verbal materials because in large measure they rely most heavily on those materials for their functioning.

6. Writing Assignments

Purpose: Student should create, and express his own ideas.

Skill: Written expressions, style interpretation.

Drawback: Students may borrow or plagiarize.

Note: An old favorite that may draw extensively from both hardware, software, and worldly resources. As a resource activity, it should be a ***culminating*** project that is used ***after*** the student fully comprehends a set of skills and their relationship to other skills and knowledge in a given field of study.

7. Tests

Purpose: To give students feedback on their learning.

Skill: Largely writing and reading.

Drawback: May measure test-taking skills more than knowledge.

Note: Tests are in large measure the definitive resource because they provide both teacher and learner with direct feedback on the appropriateness of instruction, the intent and clarity of the objective, and the mastery of the skill by the pupil. A test is the final resource or activity of a lesson and should be a ***primarily diagnostic*** device for prescribing further learning directions for the student. Tests have many forms—from essay to multiple choice and projects to role playing. They are included under software because somewhere in every unit, ***some printed assessment should take place.***

EVALUATION OF PRINTED MATERIALS

Printed materials come in many forms, including: textbooks, workbooks, professional books, tradebooks, technical manuals, technical journals, professional periodicals, curriculum guides, courses of study, monographs, pamphlets, bulletins, brochures, and newspapers. Supervisors should work closely with librarians to assure that appropriate printed materials on all curricula are placed in school district libraries which will help teachers to do professional teaching. Next, supervisors should work closely with librarians to assure that teachers are thoroughly knowledgeable of the valuable resources in the libraries and are making full use of them.

All secondary teachers should continue the important responsibility of teaching reading. Learning to read cannot be concluded in elementary schools. Practically all of the growth in reading ability with vocabulary in specialized curricula will take place in high schools and even later in institutions of higher learning. Here we are referring to curricula such as science, sociology, economics, and various vocational education programs.

Reading should be used in secondary school classes to reinforce and be reinforced by other instructional resources. Supervisors should work with teachers to help them preview and evaluate the reading materials chosen for students. Some evaluative criteria to keep in mind are:

Readability

The readability of materials should be within the capabilities of students. One factor to keep in mind is sentence structure and length. Are the sentences easy to follow or complex? Another factor is the level of difficulty of the vocabulary. This does not mean that difficult technical terms cannot be used. Such terms are essential in specialized curricula and will usually be learned by students who have a motivational goal interest in the specialized fields they are studying. The writing should be difficult enough to challenge students, but not so difficult as to discourage them.

Quality of Illustrations

Are the illustrations a part of the message, or are they merely used for cosmetic effect? The illustrations should be an integral part of the reading message. Teachers also should teach the messages related by the illustrations.

Up-to Dateness of Reading Content

Is the reading content up to date? In our fast-changing world of today, this is very important, or teaching will be conducted which is no longer practical or relevant.

Relation of Reading Material to Unit of Study Objectives

The reading material should be pertinent to course of study objectives. In choosing materials for instructional use, supervisors and teachers must be guided by their program goals and objectives. Reference reading materials should be selected for use when they have a direct bearing on the objectives being taught. This means that teachers will have their courses of study determine their direction for teaching and not the way printed materials appear necessarily in publications. Reference materials are not meant to be read in sequence from cover to cover. The printed material may in itself provide for the use of other instructional resources. Field trips or other activities may be suggested. The use of audio-visual materials may also be suggested by the textbook. Thus, the printed material may be a part of the total package for the instruction of a unit.

Checklist for Activity Book or Workbook

The activity book or workbook is widely used. However, certain precautions should be followed in selecting workbooks. Below is a checklist for guiding supervisors and teachers in using these books:

1. Is the reading content level of the book appropriate for the students so that they are able to use it in a **self-instructional** manner?

2. Does it provide the experience required for students to achieve course objectives?

3. Does it provide for individual differences of students so that they can use only those parts of the book which are pertinent to their individual enhancement of learning?

4. Does the book encourage thinking?

5. Is it largely a self-instructional book? It should not require a lot of teacher explanation.

6. Can students grow in learning development through use of the book?

7. Does the book provide opportunities for students to have written expression experiences, and not be restricted to supplying only abbreviated responses?

8. Is the use of the book interesting and challenging to students?

PROCESS FOR SELECTING TEXTBOOKS

The process for selection of new textbooks and many other instructional materials covers eight steps. They are:

Establishment of a Review Study Committee
This committee should be composed largely of teachers. Committee members should be capable teachers, knowledgeable of the curricular subject under study, conscientiously interested in giving service on the committee, and people who tend to be objective and scientific in the problem-solving process.

Development of Criteria for the New Textbook or Other Materials
The committee, under the leadership of its committee chairperson, should deliberate on what they want and then write criteria. The criteria should cover all of the elements that committee members want the new textbook or materials to satisfy.

Communication with Publishers to Request Provision of Copies of their Books for Review
This communication should be channeled through one individual—possibly the committee chairperson, a supervisor, or administrative official. The first letter to publishers should indicate the curricular goals of the book being sought, its range, subject, grade level and to what extent the committee is interested in supplementary non-book materials. In this letter, ground rules should be established as to whether sales representatives may or may not be in touch with individual committee members or should work through the chairperson during the selection. The committee should determine whether to request sample copies. Better yet, it is quite wise for the committee to leave the matter of providing free samples for the committee up to the discretion of the publishers. Sampling is essential to the selection process, but it is expensive. The cost of samples is inevitably built into the ultimate price of materials.

Presentations and Demonstrations of Textbooks and Supplementary Materials by Publisher Representatives before the Committee
This should be made only when the selection committee has narrowed its choices by identifying books and supplementary materials that appear to best meet the criteria originally developed by the committee. Committee members should submit their final selections for some testing action by other teachers. These testing conditions may be through trying the materials out in classrooms or during inservice sessions.
The evaluational reports of other teachers and students should help the committee in reaching its final decision. Each of the presentations by selected publishing representatives should be planned very carefully. Each presentation should be operated under exactly the same precise conditions on such matters as program format, time for presentations, time for committee questioning of representative, etc.

Approval By Committee for Recommendation
The final approval of the committee should be achieved by consensus if possible. Some interim poll voting may take place in narrowing down to the final nomination. If there are final dissenting points of view, they should be treated respectfully and passed on for consideration by the administration. The final detailed recommendation should be routed forward through the proper school district officials for eventual disposition with the superintendent. These officials vary with the size of school districts. They are usually department heads, curriculum directors, supervisors of subject matter, and assistant superintendent of instruction.

Report of Recommendation Sent to Superintendent
The report should also treat such topics as the ways the new textbook and its supplementary materials relate to the curriculum, major reasons for the choice, and strengths and advantages of it. Anticipated inservice education needs should be suggested. Costs for the book and supplementary materials should be listed. The administrator in charge of business and finance may need to certify that the proposed outlay for the book and any supplementary materials is within the budget.

Presentation of Recommendation of Textbook to Board of Education for Securing their Approval
In reviewing the committee's recommendations, the superintendent may request additional data from the administrative official in charge of instruction and the committee chairperson in order to assure getting approval from the Board, and also to avoid any possible public criticism. He will also want examination copies to show Board members. It is well for the chairman of the study committee to attend this Board meeting to respond to questions if called upon.

Inservice Education on Use of New Textbook
Effective use of the new textbook by teachers is the payoff. Supervisory leaders should assure that publisher representatives provide inservice help to teachers on use of the new materials. Their consultants can do this through workshops for teachers and/or classroom demonstrations of the materials.

CREATIVE USE OF PRINTED MATERIALS

Provided below are a few tips of uses for supervisors and teachers to make with newspapers, government pamphlets and other printed materials which they have at their disposal:

- Encourage students to read more about their program by bringing to class provocative paperback books they can easily read and understand. One can secure from the librarian a listing of paperback books.

- Make effective use of educationally-sound periodicals, including technical and trade association journals. Secondary students should make frequent use of the trade journals which specialize in their program fields. Articles from such magazines can be the basis of lessons, can be posted on bulletin boards, or can be made into photocopies and distributed to the class for study.

- Supervisors should encourage teachers to be conscientious about keeping scissors at hand always when reading newspapers and magazines for the purpose of clipping out cartoons, feature stories, editorials, pertinent local news stories and how-to-do-it features which will interest members of classes. Also, students should be challenged to look for and bring in like items for use in their classes. Student teams can be organized to maintain interesting and worthwhile bulletin boards supplied with such items.

- Supervisors should guide teachers to the world of free materials they can send for from government agencies, trade and professional associations, industry public relations departments, and business houses. Teachers can be encouraged to develop lists of such free materials and then have each student select one and write for it.

USE OF LIBRARY RESOURCE TOOLS FOR PROFESSIONAL GROWTH

Supervisors should encourage teachers to make use of major library information retrieval tools to increase their awareness of what has been done and is being done to solve educational problems. Literally thousands of books, research reports, texts of speeches and journal articles are published daily. To obtain information on these resources, supervisors and teachers should make use of the library retrieval tools listed below:

1. The ***library card catalog system*** is a most important resource which should be used regularly by educators and students. Most library card catalog systems include subject, author, and title sections that can direct the searcher to specific reading materials that have been acquired by the library in which the system is housed.
2. The *Readers' Guide to Periodical Literature* lists a wide selection of periodicals.
3. The *Educational Index* lists bibliographic data on periodicals within the realm of education. Supervisors and teachers should make use of this resource. It normally does not appear in a secondary school library.
4. *Dissertation Abstracts International* is another professional resource for supervisors and teachers available in college and university libraries.

MANAGING INSTRUCTIONAL RESOURCES

The advantages of using a wide variety of resources is immediately lost if teachers do not have a well-planned system for organizing these resources. Supervisors can help teachers with this management. Some suggestions for teachers are:

1. Develop a ***simple*** in-class library system which provides for addition of new books and easy check-out and check in of materials.
2. Provide students with procedures to use the learning resource center or library, reading labs, etc. Be sure these centers have a list of your resources to be purchased as monies are available.
3. Organize a similar topical file drawer system for handouts, bulletin boards, pamphlets, magazine articles, etc.
4. Delegate students to collect pertinent educational materials from businesses, industry, community agencies, news media, and their homes.
5. Instruct students on the use of libraries.
6. All periodicals do not have to be purchased new. Collect used magazines from homes, trade associations, businesses, etc.
7. Have students develop a class card file giving information on library materials available for specific topics in your program.
8. Plan regular meetings of local educators to share information on resources available and ideas for instructional techniques using a variety of resources. This might include scheduling use of shared resource items.
9. Develop a file of case studies, experiences, etc. which are related to specific instructional objectives of your program.
10. A calendar is an excellent planning tool for reminders on the need for obtaining specific resources in keeping with your curriculum plan.

SELECTION OF INSTRUCTIONAL SUPPLIES

Teachers need a vast variety of instructional supplies for students to use—especially in their laboratory instruction. The foods teacher in home economics needs food supplies of all kinds; the chemistry teacher needs varied chemicals; the carpentry teacher needs lumber, nails, screws, etc.; the stenography teacher needs a large supply of typing paper, carbon paper, etc.; the art teacher needs oil paints, paint brushes, lettering pens; and the primary teacher needs construction paper and vocabulary and mathematics cards. We could go on illustrating lavishly. The point we are making is that students spend a large amount of time in their instruction in working with material supplies which are a vital part of their meaningful learning. Without an adequate supply of these materials, the teacher is handicapped in teaching professionally, and the student is inhibited in learning adequately. Provision of adequate instructional supplies which are of appropriate quality is absolutely essential if good, meaningful teaching-learning is to take place.

It generally is the responsibility of the superintendent, with the help of supervisory leaders, to handle the responsibility of securing an adequate quantity of these supplies. Supervisors, working with teachers, will provide the leadership for selecting the type of instructional supplies to be used in the various programs. This selection process is important. It is well to develop criteria in advance to use as guidance in making the selections. Using these criteria, these professional team members can be guided in securing the best and most of instructional supplies for the respective programs that budgeted funds can permit.

The general actions described previously in this chapter for selecting textbooks are largely applicable also in the selection of instructional supplies.

SELECTION OF INSTRUCTIONAL EQUIPMENT

Equipment in educational programs is of extreme importance. Since many students spend large portions of their learning time in a laboratory working with equipment, it is of the utmost importance that there is adequate equipment of good up-to-date quality.

Superintendents, with the help of supervisory leaders, will be responsible for purchasing this equipment. Leadership here must be provided heavily by specialized supervisors who work with teachers to make studies of the varied equipment. In making studies of the equipment, the professional team members again should develop criteria in advance which they should use in guiding their selection process. Of course, the selection process will involve considerable discussion with commercial sales agents who handle the various pieces of equipment. Up-to-dateness, efficiency, and serviceability of equipment are most important criteria, as is also the cost.

Team decision-making is encouraged in arriving at the final selection of equipment, team members being the superintendent or his designated administrative person, supervisors of the program area, and teachers of the program area.

There is no single set of criteria that can be prescribed for making selection of instructional equipment. The criteria need to be appropriate for the item to be selected. However, supervisors and team members might draw ideas for their specialized criteria from the following general listing of criteria for selection of single items of equipment.[1]

Functional Requirements—Does it possess the following features?

Safety
- Non-toxic and easily cleaned
- Designed to avoid injury from sharp edges, protruding parts, tipping, splinters, and electrical, mechanical and thermal hazards.
- Flame resistant.

Durability
- Strong enough to stand heavy usage
- Resistant to weathering
- Easy to care for and store

Adaptability
- Appropriate in size and form
- Usable in more than one way
- Nonsexist

Accountable
- Resonably priced
- Appealing on a long-term basis

Educational Requirements - Does it contribute to growth in the following areas?

Intellectual
- Adapts to different needs, interests, and abilities
- Arouses curiosity, stimulates initiative, and invites exploration
- Provides for concrete experience as a basis for abstract learning
- Involves as many of the senses as appropriate

- Promotes thinking and encourages practical problem solving
- Provides for broadening of concepts

Physical
- Provides for skill development
- Provides for improvement of coordination
- Motivates action

Social-Emotional
- Provides opportunity for a variety of individual, partner, and group activities
- Encourages a favorable attitude toward self and others
- Stimulates creative responses

SELECTION AND USE OF INSTRUCTIONAL TECHNOLOGY

The educational process throughout history has always involved some degree of instructional technology. The earliest educators made illustrations in the sand or on rocks to stress a point to the learner. Later, work samples and models along with finished products were used to illustrate quality workmanship and stimulate the learner.

With the coming of "public education" the one-to-one teaching-learning situation was no longer possible. The teacher had to develop other techniques to communicate with larger numbers of learners. The chalkboard came into use so that the teacher could provide better visual stimulation for the larger number of learners. The bulletin board was also used to develop interest and illustrate various items for the learners. The chalk and bulletin boards have been standard tools of instructional technology for a long part of history.

With the explosion of knowledge and the development of a highly interactive industrial society, learners were required to assimilate more in basically the same time frame. These factors coupled with the different learning levels brought about by "mass education" caused educators to search for better ways to communicate. The new methods had to provide for a more rapid transfer of knowledge while maintaining a highly effective learning level.

Instructional technology has come from the identified needs of the educators and learners. The development of such technology has been possible through the development of industrial technology.

Effect of Instructional Technology on Learning

Technological devices which provide visual and/or audio stimuli and which interact with the student can be used to strengthen the learning process. A few selected uses of these devices include:

1. Stimulation and motivation of learner interest
2. Introductory activity or initial learning experiences
3. Redirected reinforcement or emphasis of a learning activity
4. Repetitive stimuli to provide internalization of a learning experience
5. Varied stimuli for different learning types and abilities
6. Examination of experiences not readily available in the classroom setting
7. Paced learning experiences with programmed return-to-basic areas which the learner does not understand
8. Recording of student progress with interactive devices
9. Learner review of learning experience after a time lapse

Selection and Use of Instructional Technology

Supervisors need to become familiar with various types of instructional technology and their use and general operation. In school districts where there are audio-visual specialists, supervisors will make use of their expertise. However, supervisors must remember that learners and instructional staff members are not instructional technology technicians. Therefore, equipment selection must be made for the learners and teachers who have little knowledge of its use and who have little time to learn how to use the equipment.

Some of the following points may assist the supervisor in the selection of instructional technology equipment:

1. Operation of the equipment must be **simple** and provide for quick set-up and use.
2. Items necessary for the operation of the equipment must be permanently attached to the equipment.
3. Replacement parts and service must be **readily available** for the equipment.
4. Marketed materials must be **examined before purchasing** a piece of equipment which is used with marketed materials.
5. The equipment must be **practical** in use and provide positive benefit to the learning process.
6. Time and equipment must be available for development of materials for use on equipment which requires "in-house use" material development.
7. Storage and access to equipment must be arranged so that equipment and supplies are readily available to the learner and teacher.
8. An administrative and teacher commitment

must be made for the development of instructional technology in the educational setting.

The supervisor will find two sources ready and eager to discuss various pieces of equipment. The first source is the user. Persons who are using different types of equipment will be able to inform one of the benefits and problems with that type of equipment. The second major source of information is the vendor. The vendor will be more than happy to discuss and demonstrate all types of equipment. Supervisors must sort out the sales jargon. Also, vendors are always ready to provide inservice work for staff.

The best place to start with the development of instructional technology is with the items now available. That is, develop staff chniques with chalkboards and bulletin boards. Another technique would be to start with a simple Dymo tapewriter to label items so that the teacher and learner can use the visual reinforcement to strengthen the learning process.

Keep the instruction simple. Don't start with complex multi-media presentations. Complex and difficult equipment and programming will discourage both staff and learners. It is the supervisor's role to understand instructional technology and its place in each learning situation.

Supervisors will have a problem of training staff to use a variety of instructional technology without having staff members become dependent on one type.

The supervisor must provide inservice in the use of instructional technology. The use of any instructional technology will require preview activities and follow-up activities. Supervisors should arrange for the preparation of instructional technology guides or handbooks as the program is developed. These become key elements in a program.

The extent of instructional technology in a school setting can vary from simple to complex, depending upon commitment and budget. Supervisors must select and develop their programs within these constraints.

Basic Instructional Technology and Equipment

The list of instructional technology items is too numerous to fit within the scope of this chapter. One can recall from his basic audio-visual experience a partial list of the more common equipment. This list may read as follows:

16mm Projectors
35mm Cameras
35mm Projectors
    slide-sound
    console projectors
    film-loop projectors
Overhead Projectors
Cassette tape player-recorder
Super 8 Projectors
Super 8 Cameras
Filmstrip Projectors
    strip-sound
    individual viewing devices
Opaque Projectors
Record player
Reel tape player-recorder

This chapter does not attempt to minimize the equipment for use with marketed material. This material has benefit in the learning process. However, some of the best materials are those materials which are developed "in-house." Therefore, equipment for that use is discussed. The following are only examples of items available:

- ***Movies***

Super 8 movie equipment provides an inexpensive way to record demonstrations and work techniques. With a simple camera and a few lights, the teacher can develop a complete library with very little effort. With a Super 8 film loop player, the learner can review these demonstrations at a self-paced speed. The films can be made with sound or one can use integrated and synchronized audio-cassette players to reinforce the visual stimulus. All of these systems illustrate to the learner the use of actual laboratory tools and materials.

The new Polavision system will be of great benefit to many teachers. The camera is simple to operate with a zoom lens. The film medium is in cassette form with two and one-half minutes of film per cassette. The Polavision player is simple to operate by inserting the cassette. This system of color film recording provides the teacher with an effective way to help the individual learner with difficult learning situations.

- ***Slides***

The 35mm slide camera and projector provide the teacher with another effective way to develop instructional materials. The cameras are simple to operate with very little instruction. The teacher can produce slides of the various aspects of the instructional program. The student can use any of the numerous types of projectors in a study situation. The slides can be narrated through synchronized audio-cassette players or the teacher can prepare a written script for a set of slides.

• ***Sound***

Many times we view the cassette player-recorder as such a simple device that we fail to see its benefit in the instructional program. Many learning situations can be reinforced through the use of sound medium. Sound allows the learner to contrast and compare. Tapes can be developed so that the learner can follow a difficult operation in a step-by-step manner.

•***Overhead Projector***

The overhead projector is such a common item that many times teachers depend upon this item without looking for other items of instructional technology. The overhead projector is an effective tool, but the supervisor needs to work with the staff to develop the best possible instructional techniques. Administration must also provide appropriate equipment for transparency production.

•***Opaque Projector***

The supervisor should review the opaque projector as a part of the instructional technology program. This projector accepts flat materials and three-dimensional objects for group viewing. Color and contrast can be projected for easy viewing. The opaque projector is often overlooked as a valuable tool.

•***Laminators***

A part of a good instructional technology program should include a laminator. The laminator permits the teacher to develop long-lasting visual materials. The most economical laminators are those which use two-sided pouche film rather than roll film. Instruction sheets or illustrations become semi-permanent when laminated.

•***Video***

The technology change within the video industry has made video a viable part of the instructional technology program. The new color cassette portable cameras are easy to operate and have good picture quality. The built-in microphones provide high fidelity sound. The zoom lens and monitoring features allow the teacher to develop professional materials with little problem. The video playback units enable the teacher to edit and to add narration or make audio changes. The units also include slow motion or stop action features for special work.

•***Radio and Television***

Many school districts make good use of educational radio and television. This is more effective when school districts have some influence over the programming so that it can be related to the local curriculum. Supervisors can also assist teachers in their discriminative use of commercial radio and television as an important resource for classroom instruction.

•***Computer***

The uses of the computer as a tool of instructional technology are unlimited. Supervisors have to carefully examine the hardware and software availability within their districts and develop this element of instructional technology as appropriate.

Ways the Supervisor Can Keep Updated With Instructional Technology

Advances in integrated instructional technology systems occur daily. The supervisor must keep up to date with these developments, but cannot always be going to trade shows or exhibits. The industry realizes this and produces publications to keep the educational system updated. Examples of four such publications are listed below. These publications are free. Others are available and still more are available for purchase.

- *Office Product News*
  United Technical Publications, Inc.
  645 Stewart Avenue
  Garden City, New York 11530
- *American School and University*
  American School and University
  401 North Broad Street
  Philadelphia, Pennsylvania 19108
- *School Product News*
  Penton/IPC, Inc.
  614 Superior Avenue, West
  Cleveland, Ohio 44113
- *Curriculum Product Review*
  Curriculum Product Review
  65 East Palatine Road
  Wheeling, Illinois 60090

SELECTION AND USE OF COMMUNITY RESOURCES

For the purpose of this chapter, community resources are defined as people, materials, and places located in the community area surrounding a school that can assist the school in accomplishing its objectives.

Because education is primarily a person-to-person process, the greatest educational resource of any community is the people within it. Community members can be of assistance to schools as advisors, guest speakers, children and youth counselors, employers, and curriculum consultants.

Resource Guide of Community Speakers

Supervisors, working with selected teachers, should develop a community resource guide on potential community people who can make worthy contributions as speakers on various aspects of the curriculum. Securing the names of such community members can be achieved by conducting a survey through all professional staff personnel. Potentiality for success of such speakers, as contributors to the curriculum, should have validations by additional professional staff personnel. Desired community speakers should be contacted in advance of their being listed in a resource guide in order to confirm their willingness to serve. The resource guide should carry speakers' names, their speaking topics, and their addresses and telephone numbers. If there are only certain times they are able to speak, such times should be specifically mentioned. This resource guide should also list the grade levels which would be appropriate for the guest speakers.

Field Trip Sites

Supervisors should also work with teachers in developing a community resource guide on field trip sites. The same process steps as were mentioned above for the Speakers' Resource Guide should be used in developing the Field Trip Study Guide. For this guide, the names of the field trip sites should first be listed. These should be followed by listings of names, addresses, and telephone numbers of contact persons. Finally, there should be a listing of grade levels and/or subject area groups which would be most successfully handled at the field trip sites.

Other Community Resources

Students can be provided first-hand field experiences in communities through internship programs.

Work experience in the community is most valuable training for youth. Counselors and other professional staff personnel in schools should devise ways for helping interested students gain employment experiences.

Youth activities through community agencies should be encouraged by schools with such agencies as Boy Scouts and Girl Scouts, YMCA and YWCA, churches, television, radio, press, and Junior Achievement.

We have provided only a sampling of community resources which can be used for educational purposes. Supervisors can and should enlarge their leadership over the instructional uses of this vast living laboratory for learning.

PRINCIPLES FOR SELECTION AND USE OF INSTRUCTIONAL RESOURCES

It is very important to select the proper teaching aids. Just as the craftsman selects the proper tools for his work, so must supervisors and teachers select the best materials for the job from the ones at hand. This task is much more complicated because educators are dealing with human beings as well as inanimate objects.

Some basic principles which apply generally to instructional resources are described here:

1. ***Select resources to fit the maturity, interest, and ability of the students.***

No one type of resource can be considered adequate even for a single group of students. Every class has a wide range of interests and abilities. This implies that a wide variety of instructional resources must be selected to reach various ability and interest levels.

2. ***Select the best resources for the particular learning experience.***

Not all resources are equally effective for any particular learning experience. Resources should be selected in terms of what they can best accomplish. In one situation, a film may be best for giving an overview to a unit or topic; in another, a resource visitor may be better; in yet another, a book may be best. Teachers should be helped by supervisors to evaluate which tools will best suit specific teaching and learning needs.

3. ***Maintain usage of a variety of instructional resources.***

A variety of instructional tools and experiences selected in terms of the needs of the students helps to maintain the interest and motivation of students. It is important for teachers not to overuse any one resource. The natural curiosity and expressiveness on the part of students should be cherished and nurtured through their constant learning experiences with a variety of instructional resources.

4. ***Produce local resources to help fill specific needs.*** With the extensive production and distribution of commercial materials, supervisors and teachers should not overlook the opportunities to produce their own instructional aids to fit local or specific needs. National producers of instructional materials cannot afford to make teaching aids fit every local instructional situation. They must be concerned with broader aspects of the national curriculum. Materials which deal with the local environment must be produced by school districts or by teachers and their classes. Production of local films, slides, charts, books—in fact, any teaching device—is well within the realm of possibility; and from the instructional point of view, there is great value in having students make materials of a local nature.[5]

Primary teachers tend to be most creative in the development of their own instructional materials. Teachers in all other grade levels could profit from inservice exposure with primary grade level teachers to gather adaptation ideas for personally developing instructional materials.

5. ***Help students develop skills in selection and evaluation of media.*** Every person in our society is constantly under the influence of communication media. The radio, newspaper, motion picture, magazines, and television all carry messages trying to influence the prospective buyer to action. Editorials, panels, speakers, and films also carry messages whose real meaning each individual must evaluate himself. How to evaluate the ideas with which he is constantly bombarded is an important aspect of any individual's growth and development. Teachers should help students develop the necessary power of discrimination so they can become good users of all available means of communication.[6]

SCHOOL BOARD POLICIES ON SELECTION OF INSTRUCTIONAL MATERIALS

Written school board policies should exist that will give the administration and faculty direction and authority in working out sound selection procedures. In considering policy, a board has a wide choice of elements. It might wish to incorporate into its policy statement such concepts as the following:[7]

- Our district desires up-to-date, educationally valid materials.
- Materials must carry out curriculum and instructional goals of the district.
- Every student must have access to an adequate supply of instructional materials.
- Materials must reflect the interests and needs of multi-ethnic enrollment and our pluralistic society.
- Materials must reflect sex equity.
- An entire range of media, from print to electronics, shall be used.
- Instructional materials will be under continuous review and assessment.
- Teachers, under the leadership of supervisors, are the prime decision-makers in the selection of instructional materials.
- Views of parents and students shall be taken into consideration.
- Procedures for selection shall be under the superintendent or his designee.
- Opportunities for review, appeal, and repeal of decisions shall exist.
- The selection process shall be free from unreasonable restraints.
- The selection committee should be provided time, space, tools, and authority.
- The administration should see to it that the selection committee:
  - Has the authority to schedule meetings or sub-committee meetings
  - Can arrange for visits or conferences
  - Has funds to engage expert consultants
  - Has the means to complete its final recommendations
  - Has clear channels for bringing recommendations to the superintendent or board for approval.
- The superintendent and his associates must create the conditions under which the selection process will move toward productive and conclusive results. It is the administration's duty to provide a clear statement of what is expected of the selection committee and to seek adequate financial, physical, and administrative resources for those involved in selection tasks. Selection committees do their best work when they feel that school authorities know and care about what they are doing.
- A majority on a selection committee should be teachers.
- The purposes of selection are:
  - Identify and channel into use materials that are relevant to school curriculum
  - Contribute to the learning process
  - Make effective teaching and learning tools
  - Meet the unique needs of the school district.

- The selection process will strive in all instances for:
  - Materials that insure the fulfillment of district curricular objectives
  - Materials designed to promote sequential progress for all students while in school
  - Materials that provide for differences in ability, interests, achievement, and background
  - Materials that recognize that America's peoples take pride in their sex, race, religion, and social backgrounds
  - Materials that encourage self-instruction
  - Materials that call upon the learner's eye, ear, sense of touch, and kinetic propensities.
- Among the goals of the selection process should be plans to assure that classroom teachers:
  - See the values, benefits, and advantages of the newly selected materials
  - Know how to put them to work for the benefit of the student
  - Make the transition from the old to the new smoothly.

SUMMARY

The supervision program must make use of adequate and appropriate instructional resources for operating its curricular program. This requires that there be provision for securing a wide variety of well-selected printed materials, educational technology, instructional equipment, and community resources. Finally, to assure effective usage of these resources, provision should be made for teachers to share ideas on a system-wide basis through such media as newsletters, teachers' meetings, and inter-visitation.

The school system must develop procedures which will assure a fair and objective evaluation of all instructional materials which are selected. This means an understanding not only of what the specific materials will contribute to good teaching, but also how well they will meet the objectives for schools in the school system. Teachers are most likely to choose wisely when they are encouraged to have reasonable opportunities for discussion with publishers and suppliers of instructional resources. Since teachers meet children daily and know their needs best, they should exercise a primary influence in the selection of instructional resources. Supervisors should serve as educational leaders in the selection and use of the resources. Below the author provides a set of criteria which summarize leadership principles for supervisors to consider in the selection and use of instructional resources:

1. Provision is made for securing a wise variety of good instructional resources.

2. The school system prepares an inventory of community resources that can be used to enrich the curriculum.

3. A school system ***instructional materials center*** is provided with an adequate supply of appropriate instructional resources readily available for use by teachers.

4. Provision is made for sharing ideas on resources by teachers in the school system through such means as newsletters and teachers' meetings.

5. Teachers are informed about free and inexpensive materials.

6. Teachers have available to them a variety of curricular materials to meet the differing individual needs, interests, and abilities of all their pupils.

7. The school system applies criteria in the selection process for books and other materials which it purchases.

8. Classroom teachers participate with supervisors in a team approach to select instructional resources.

9. Teachers are invited to serve on selection committees on the basis of their experience, teaching competence, individual judgment, resourcefulness, and interest in serving on such a committee.

10. Members of instructional resources selection committees participate freely in reasonable give-and-take discussion with individual representatives of curricular materials firms.

11. Adequate released time is provided for teachers to do a thorough job in their study.

12. Publishers are notified in advance by letter of pending adoptions, information on the kind of materials desired, the plans for interviews, and the schedule for hearings.

13. When studying textbooks, selection committees are encouraged to study carefully materials accompanying the texts such as teachers' guides, workbooks, tests, and other helps.

14. Proper inspection, trial, and comparison by the selection committee, using criteria based on the goals of the school system, are used as the basis for determining recommendations.

15. An adequate library of professional resources is available to teachers.

16. Teachers are made thoroughly acquainted with instructional resources that are available and with ways in which these may be used.

17. Evaluation of instructional resources is carried on as a continuous activity rather than as an operation which takes place hastily just before the purchase of them.

18. The inservice education program on new instructional resources helps teachers make effective use of them.

19. Provision is made for regular inspection, care, and upkeep of materials.

20. The instructional materials are properly cataloged and stored.

21. The instructional materials are multi-ethnic and meet conditions of sex equity.

22. The public is kept informed about the materials and equipment being used.

23. Supervisors help teachers to guide their pupils to develop creative instructional materials in the classrooms.

24. Faculty members are encouraged to display creative materials prepared by pupils in an attractive manner on bulletin boards and as classroom exhibits.

25. Leadership and time are provided in the inservice program for teachers to work together in the preparation of instructional materials.

26. Field trip and community speaker resource guides are prepared for use by teachers.

27. Thorough use is made of educational technology in the instructional program.

ENDNOTES

1. Content on this topic is an adaptation of information gathered from a lecture by Leo D. Leonard, Professor of Education in the University of Toledo, at a conference in Columbus, Ohio, in September, 1976.

2. Edgar Dale, *Audio Visual Methods in Teaching.* New York: The Dryden Press Inc., 1951. Chapter 4.

3. This is a revision of criteria presented in *Selecting Educational Equipment and Materials,* a monograph publication published by Association for Childhood Education International, Washington, D.C., 1976. p. 28.

4. Information on this topic was adapted from content in Chapter XIII of *Improving Supervision in Vocational Education.* This book was published by the Division of Vocational Education, Ohio Department of Education, Columbus, Ohio, 1978. Chapter author is Dr. Harold Carr.

5. Amo DeBernardis, *The Use of Instructional Materials,* (New York: Appleton-Century-Crofts, Inc., 1960) pp. 7-9.

6. *Ibid.*

7. Adaptation of content on this topic in *Instructional Materials: Selection and Purchase,* NEA publication; Washington, D.C.; 1976; pp. 22-31.

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CHAPTER VIII

DEVELOPMENT AND MAINTENANCE OF SCHOOL PLANT

Frank Oliverio
Jim Stickley

THE PLANT PROGRAM

Plant Planning

Area vocational and technical education plants should be planned and designed to function in terms of the specific philosophy and programs developed by the individual school. They should not be enlarged high school buildings or small-scale university buildings. Adequate planning can help to assure that the buildings are functional, economical, and attractive and are designed to meet the needs of the individual area served.

Since the area plant will probably be constructed in several phases, it is essential that a great deal of attention be given to the long-range vocational-technical planning procedure. If a good plant is to be developed to meet the needs of the area, a comprehensive ***educational plan*** that identifies programs, equipment and objectives must ***precede*** the architectural planning.

Detailed accurate educational planning is a prime prerequisite to excellence in architectural programming and planning. The architectural design can be no more functional than the educational plan on which it is based. Thus, it is essential that the Area Superintendent, Board of Education, and staff consult with their advisory committees and assume the educational planning responsibility to assure that a plant is constructed which meets the area needs.

Planning Steps

The following steps are those an area (joint) vocational school board and staff might follow in developing a good school plant:

1. Determine the overall educational philosophy and develop the educational goals for each program.
2. Conduct surveys to ascertain employment opportunities in agriculture and business and industry and the interests and needs of those students who should be enrolled in vocational programs.
3. Determine facilities needed by:
   a. Computing estimated future enrollments.
   b. Identifying instructional areas.
   c. Determining auxiliary activities, i.e., "clubs."
   d. Evaluating any existing facilities.
4. Develop a comprehensive ***educational plan*** with the assistance of consultants. It should include the curriculum outline, showing the objectives for each area and equipment and facilities necessary to meet the objectives.
5. Determine the financial resources for the building program.
6. Retain an architect to assist with the plan, site selection, and site development.
7. Develop a realistic time schedule to assure that facilities will be available on schedule.
8. Have the architect prepare schematic drawings for the initial stage of the planning procedure based on the written educational plan.
9. If federal money is to be utilized in the construction and equipment of the building, submit an application for assistance.
10. Carefully develop plans and target dates to submit building bond issues and operating levies to the voters.
11. Work with the architect, giving advice on the educational plan and allowing the architect to use his professional skill.
12. Upon completion of the building project, a maintenance program for buildings and equipment should be designed and followed.

Planning In Cooperation with the State Division of Vocational Education

The Division of Vocational Education will assist local administrators and committees in the development of the educational phase.

Each joint vocational or area board should present evidence of adequate preliminary planning along with the preliminary building plans and specifications. Preliminary planning includes:

a. Tentative program approval.
b. A master plan.
c. Written educational plans and objectives.
d. Site showing location of proposed facilities and existing facilities if any.
e. Schematic elevations.
f. Outline of the specifications

Building plans should be submitted for review at the completion of two phases of their development. These two stages are:

a. The final schematic plan approved by the local board.
b. The final preliminary working drawings adopted by the local board.

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After the State Division of Vocational Education approves the building plans, no major changes regarding educational adequacy should be made during subsequent phases of planning or construction unless a copy of said change is filed with the Division of Vocational Education and is approved.

SELECTION AND USE OF AN EDUCATIONAL CONSULTANT

External assistance from an individual consultant or from a group can be invaluable to a school district when it is faced with a particular problem or a group of problems. If the firm or individual has the expertise and the integrity, the study and recommendations will add information upon which the school district may base decisions.

In some districts a person under contract to the Board of Education may be able to provide consultative services, but in most situations, available time for consulting may be a problem.

Advantages of Using a Consultant

Advantages of using a hired consultant who is not a member of your staff include:

1. The magnitude of school operations and construction are so complex that the local administrator cannot be an expert in all areas.
2. The consultant will have established contacts with many groups and programs which may help bridge the gap for local problems.
3. The consultant will free staff members so they can continue meeting the requirements of their position.
4. The consultant should be able to present an impartial viewpoint and should not be affected by local pressure or special interest groups.
5. The consultant will have materials prepared which may be useful and time-saving in your project.
6. The consultant should be able to save your money by offering ideas which will prevent you from making mistakes in the planning, developmental and construction phases of the project.

Disadvantages of Using Consultants

Disadvantages of using an outside educational consultant are:

1. Additional cost of the consultant will decrease money available for construction and/or equipment.
2. The consultant may not be familiar with local wants, needs and circumstances.
3. Materials and ideas of the consultant may not fit locally and may be outdated if the consultant is not current with new ideas and construction processes.

Selection of a Consultant

Selection of a consultant should be based on a thorough study of the person's background and past experience in school consultation and construction. It is most important that the consultant understands that the Board of Education is the employer and the consultant is the employee. If this relationship can be developed and maintained, the consultant can be a valuable asset to your project.

DETERMINING THE CURRICULAR NEEDS

New construction or renovation of buildings should be based on a study of the educational program. If the need is not based on the curricular needs of the district, perhaps building or renovation is not necessary.

To determine curricular needs, several items should be considered. Among these considerations are:

1. Student interest in possible curricular offerings.
2. Needs of local and area business, industry and agriculture correlated with curricular offerings and future employment needs. This information can best be gathered through use of advisory committees.
3. State or federal requirements based on requirements for graduation or law.
4. Labor-market statistics that project the number of job opportunities available annually and over a five or ten-year period.
5. Enrollment projections.

To determine these needs, it may be necessary to conduct student, business, industry and agriculture surveys. The results of these surveys will provide valuable data which will help decision makers justify inclusion or exclusion of various curricular offerings.

SELECTION AND USE OF AN ARCHITECT

Educational writers have stated for years that the school board's most important task is the selection of the superintendent; this idea can be extended to the school facility area and interpreted to mean that the school board's most important task in the school building program is the selection of the architect. When the board is seeking a superintendent, assistance is available from different placement agencies and other sources. The pattern of assistance for the school board seeking an architect is not as well defined. School boards normally also have less experience in selecting an architect, for the services are not required on a daily basis and evaluation is also somewhat difficult.

Names of potential architects should be obtained from a variety of sources to eliminate possible partisanship and to increase the number under consideration. In most states the state society of architects can furnish a list of architects who have indicated an interest in working with schools. The state education agency can also provide a list of architects who have worked with schools. In some cases colleges and universities have faculty members who can also provide a list of architects who have provided satisfactory architectural services for schools. Rather than relying upon a single source, local school officials should seek recommendations from several sources and develop local criteria which can be used in screening the nominees. When the nominees have been reduced to an appropriate number, normally from five to ten, representatives should be approached to determine interest and interviews should be conducted in the local school district. After the number under consideration has been reduced through the interviews, the school board and members of the central staff may choose to inspect buildings which have been designed by the architects under consideration. The visitation should consist of more than a mere tour, for the building's principal, teachers, and custodians can provide valuable information concerning the quality of the architect's work. Caution should be exercised to assure that deficiencies of the contractor are not attributed to the architect, and vice versa. Building contractors can also be contacted to obtain their reaction to the quality of the architect's work and services.

Criteria for Selecting Architects

Since the cost of architectural services is determined on a standard fee basis, the quality of the service is the prime consideration; therefore, the importance of the selection process cannot be overemphasized. The following items are among those which should be considered in the development of criteria to be used in selecting a school architect:

1. Recommendations of other school districts.
2. Size and amount of experience of the architectural and engineering staff.
3. Nature and extent of previous experience in the design of school facilities.
4. Nature of the facilities to be designed for the local school district.
5. Current workload and financial status of the architectural firm.
6. Location of the architect's office and provisions for adequate communication and inspection.

Depending upon the size and nature of the contemplated project, different weights should be given to the criteria listed above. If the program is to be somewhat traditional, criterion No. 4 would not be so important as it would be when the projected program would be novel or unique and require highly specialized facilities. When the project will be rather large, criterion No. 6 may not be so important, for the architect may designate a staff member on a full-time basis during different phases of the planning. This person would spend considerable time in the local community. Regardless of the size and nature of the project, local school officials should develop a list of criteria and sequential steps which will be observed in the selection of the architect.

In our situation, special emphasis should be given to the expertise of the architect in the area of vocational facility construction. Many architects have not had experience building vocational facilities and special challenges exist in this type of building.

Architectural Services

The American Institute of Architects, professional association of practicing architects, serves as both a service and policing organization for the profession and those who receive its services. The following discussion of the different stages of architectural services has been adapted from material distributed by the American Institute of Architects:

Stage 1: Schematic Design

The architect confers with his client to determine the details of the project, time schedule, estimated cost, and means of financing. Following the execution of the formal agreement, the architect visits the proposed site, makes recommendations for the use of the site, reviews the legal items which must be considered before actual construction, prepares schematic studies, and states the probable cost and required construction time.

Stage 2: Design Development

Following the client's review and approval of the different phases of Stage 1, the architect restudies the design, prepares preliminary drawings illustrating the plan and site development, makes recommendations concerning construction materials and mechanical equipment, prepares an outline of specifications, and submits a revised cost estimate.

Stage 3: Construction Documents

When the design and preliminary drawings have been approved by the client, the architect develops working drawings and specifications which include all information necessary for accurate bidding and final construction.

Following the approval of the working drawings by the client and other appropriate legal agencies, the architect prepares final plans and other specifications necessary to provide adequate protection for his client during the construction of the facility.

The architect assists and advises the client during the bidding process and provides the necessary drawings and specifications for bidding and construction.

Stage 4: Construction Phase

During the construction phase the architect advises his client on the qualifications of prospective bidders and assists in awarding and preparing construction contracts. If he deems it appropriate, the architect may recommend that a full-time inspector be assigned to the project to provide further assurance of the quality of the construction.

The architect inspects the progress of the construction to ascertain if specifications are being followed and proper materials are being used. He prepares change orders for the client, keeps him advised of the progress of the project, and issues certificates authorizing payments as provided in the contract.

When satisfied that all terms of the contract have been fulfilled, the architect certifies to that effect, and the school district then assumes responsibility for the building after an inspection. Upon certification that all contracts have been fulfilled, the architect's normal services are completed.

Special Services

In addition to the normal services outlined in the previous paragraphs, special or supplementary services are available for additional charges. If desired, the fee for such service should be agreed upon in advance. The following list contains some typical examples of additional services.

1. Special studies of educational program or consultant services beyond normal architectural services.
2. Preparation of display drawings or models.
3. Full-time inspection or a clerk-of-the-works.
4. Reproduction of drawings and specifications beyond the agreed upon number.
5. Design of furniture, fixtures, and decorative work or assistance in the selection or purchase of such items.
6. Service as an expert witness.
7. Special travel in the interest of the client.
8. Supervision and inspection beyond normal architectural services.

As a part of their standard contract architects conduct routine inspections of the construction project and test samples submitted by the contractor. In some cases this periodic inspection is not considered sufficient, and local school officials employ a clerk-of-the-works who provides continuous inspection of the project. Even though the individual is employed by the local board and is responsible to that body or to some person or group designated by the board, the architect should be consulted and a formal definition of the duties and authority should be agreed upon for the clerk-of-the-works. This will help to reduce the possibility of later misunderstandings. In most cases the clerk-of-the-works does not have decision-making authority, but merely provides constant inspection services, submits progress reports, and notes variances for the employer. Retired and semi-retired engineers and construction leaders with previous experience in this type of construction are normally employed to perform this service.

NATURE OF EFFECTIVE SCHOOL SITE

Sites

Buildings and sites together provide for the development and successful operation of a good educational program. Therefore, the importance of selecting a good site cannot be overemphasized. The following guidelines should be considered in providing the framework necessary for a satisfactory site selection. (Consult with architect and allow him to assist in site selection.)

A. Physical Characteristics

1. Sufficient amount of useful land.
2. Acceptable shape and contour.
3. Sufficient elevation and proper drainage.
4. Acceptable soil conditions.

B. Environment

1. Clean and quiet surroundings.
2. Free from external hazards (railroads, airports, etc.).

C. Accessibility

1. Safety and convenience of approach.
2. Centrally located in the contributing area (present and projected).
3. Public transportation facilities available if possible.

D. Services (Availability)

1. Sewer (sanitary and storm).
2. Water
3. Gas
4. Electricity
5. Fire protection
6. Police protection

Size of Area Site

The minimum size for an area school site should be 40 acres for the first 100,000 in total population in the merged area, plus an additional 10 acres for each additional 25,000 in population or major portion thereof. (City districts or areas may or may not follow the above guidelines.)

Site Development

The arrangement of building or buildings and the landscaping of area sites should be considered in the master plan.

The buildings should be located back from the streets and roads to isolate instructional spaces from traffic noise and to lessen the danger to pedestrians. There should be a limited number of points of entry to the area school site in order to facilitate traffic control.

Walks should be direct and convenient to the buildings to be served. Width of walks should provide multiple lanes of approximately 22 inches, with a minimum of three lanes.

Parking Areas

Criteria for parking areas is as follows:

1. One space for each teacher and staff.
2. Architects usually look at previous two-year enrollments of 11th and 12th grades. Then it becomes an estimation depending upon urban vs. rural, affluence, or any other factors that might affect a large deviation. On the average, it is estimated that 50% of the 11th and 12th graders will drive cars.
3. The minimum slots require 8½' x 18' but the architect usually uses 9' x 20' to prevent "banging" of car doors.
4. In designing the lot it is fairly accurate to allocate 300 square feet per car. This is allowing a full space for one car plus a half space for circulation.

   Example: If you have 100 cars, the space required would be 100 x 300 sq. ft. = 30,000 sq. ft.[2]

DEVELOPMENT OF EDUCATIONAL SPECIFICATIONS[3]

As the formal communications vehicle between the professional educator and the architect, educational specifications play a vital role in sound school facility planning. In the absence of well-developed specifications the architect is forced to plan the facility in a virtual vacuum and will be prone to rely upon his past experience and personal concept of the local educational program.

Basic Data

Educational specifications should be prepared in two divisions with the first section containing basic background information about the local community, the school population, and the educational program which will be housed in the new facility. This basic data division of the specifications should provide the following information:

1. A description of the school-community including socio-economic and population characteristics.
2. An overview of the local school district with statistical information and a brief statement of educational philosophy and goals so that the architect can develop a better understanding of the setting and local aspirations.

3. A tabular presentation of detailed enrollment information with projected growth patterns.
4. A discussion of the organization of the instructional program including such items as the use of team teaching, large class-small class instruction, and vocational requirements.
5. An explanation of the content, focus, and thrust of the instructional program with supplemental information on the projected use of instructional materials, media, and recent technological developments.
6. A discussion of the different service areas to be included in the facility and their relationship to the instructional program and the school population.
7. A review of past community utilization of school facilities and a projection of anticipated future utilization.

Instructional Program

The basic data listed above will provide the architect with background information which he can use in determining general space needs and utilization patterns. A second and equally important division of the educational specifications should contain detailed information for each instructional area and service activity which is to be carried on in the proposed facility. The folowing information should be provided in each section.

1. Brief statement of general aims and objectives.
2. Number of rooms needed for the activity.
3. Detailed space requirements.
4. Discussion of the nature of the activity.
5. Full-time equivalent personnel involved in the activity.
6. Methods of teaching or other use of the area.
7. Pupil seating arrangement.
8. General description of the area.
9. Location in relation to other areas.
10. Furniture and equipment in the area.
11. Electrical outlets.
12. Special considerations relating to the specific area.

If a cooperative approach is used in preparing the educational specifications, advisory committees should be formed to review the recommendations for each service and instructional area to maintain an appropriate balance in the total allocation of space. The educational consultant with a high level of competency in facility planning can provide valuable assistance in the review of the educational specifications. The consultant can detect omissions and obvious errors which might escape the school architect.

Additional assistance may be provided by the school business administrator. The administrator's knowledge of local school plant operation and maintenance programs should be utilized as plans for new buildings are developed. Experience in the district may have revealed that certain types of traffic patterns have distinct advantages, that certain types of floors are most appropriate, or that additional attention should be given to certain features of the proposed building so that the possibility of future problems can be reduced. In basic layouts members of the custodial and maintenance staff may have identified minor alterations which can be made to assist teachers. The school business administrator and staff may desire to incorporate other features on a trial basis to determine if they contribute to increased efficiency for either instructional or service personnel.

DESIRABLE CHARACTERISTICS OF VOCATIONAL EDUCATION FACILITIES

Physical Facilities

The fundamental consideration in the design of any school plant is the educational program to be served, and a structure is not a good school building unless it implements the program for which it was designed.

General Considerations

There are certain general considerations that should be an integral part of any construction project. These are:

a. Architectural character.
b. Expansibility of facilities.
c. Flexibility within the building.
d. Design that will be functional for all, including the physically handicapped.

Architectural Character

A school building should denote clean, simple lines and provide a pleasant environment in which individuals may learn. It should not be a monument to posterity. An attempt should be made to achieve economy in terms of value received for every dollar spent. This does not mean that material with the lowest initial cost is the most economical material to buy, since many cheap products are very costly to maintain.

There is intangible, but nonetheless, real value rising from buildings that are aesthetically pleasing. Dollar value alone cannot be the only criterion used to determine architectural quality. The architect should be charged with the responsibility of achieving a satisfactory balance between the aesthetic and the practical, thus

achieving a truly economical and architecturally sound building or campus.

Expansibility

Many of the area plants will be constructed in stages, therefore, the initial units should be designed within the guidelines of a carefully defined long-range plan.

Some general rules for expansibility are:

a. Mechanical systems should be designed to adapt to future plans.
b. Access to heating lines, water lines, electrical service, clocks, air-conditioning, and public address systems is desirable when future additions can be foreseen.
c. Plan corridors, if any, to permit other units to be added.
d. Consideration should be given to the availability of materials used in the initial construction for future expansion.

Flexibility

Interior flexibility is another quality which must be given careful consideration. The program of the future is unknown, so space provided should have maximum convertibility. For example, the ultimate enrollment may require a larger library; therefore, adjoining space might be planned which could later be converted for library use. This premise should be followed in planning many of the area shops and laboratory facilities; therefore, the necessary mechanical services should be so planned as to accommodate easy conversion.

Some of the considerations of flexibility are:

a. Interior partitions should be non-load bearing.
b. Consideration should be given to demountable partitions.
c. Utilities should not be located in partition walls.
d. Structural members should be designed to permit relocation of interior partitions. Doors should be designed to swing from either side and large enough to move equipment through.
e. Inflexible items, such as toilet rooms and stairwells, should be located so as not to limit expansion.
f. Heat controls, electrical controls, switches, etc. should be designed for ease in rearrangement of rooms.

A statement from the architect should be submitted with the final preliminary working drawings, showing that the structure or structures designed are flexible and expandable.

Functional For All

All area facilities should be made accessible to and functional for the physically handicapped. Multiple story buildings should have freight and passenger elevators. Outside walkways should be free from steps and covered if practical. There should also be entrances on grade level, if possible.

Administration

The area for administrative space and the arrangement will depend upon the size of the school. The location of this space should be easily recognizable and accessible to the public, as well as to the rest of the school.

Offices

Several kinds of offices and work spaces are necessary in a well-planned and functional administrative suite.

Administrative Offices - The administrative head of the school and other administrative staff should have private offices (Superintendent, Director, Supervisors, Board Clerk, etc.).

General Offices - General offices for teachers should be clustered in office carrels accessible to a particular area of instruction. Offices for registration, counseling, placement, and other services should be designed to facilitate the traffic flow of large groups of students.

Other areas which should be located to facilitate their use by the general office personnel are:

Teaching Materials Laboratory - A teaching materials laboratory shall be provided near the teacher office carrels.

Machine and Duplicating Room - A machine and duplicating room should be provided in addition to the teaching materials laboratory.

Conference Rooms - Attractive conference rooms should be provided for area board meetings and to accommodate orientation meetings for visitors, advisory committees, small-group student study, counseling, etc.

Counseling Facilities - Counseling facilities should provide space necessary to meet the needs of the area school. Each counselor should have office space or a group counseling room.

First Aid Facilities - First aid facilities should provide the space and equipment necessary to meet the needs for first aid treatment at the institution. A toilet should be located immediately adjacent to the first aid room.

Central Storage Area - A central storage area with "fork lift" capacity may be used as a warehouse for many vocational areas. Bulk

storage should be provided for the many vocational "raw materials."

Classrooms

A regular or interchangeable classroom is one that does not contain special equipment which might limit its use, but is one that could be assigned any period of the day for various subject fields (related or academic).

Size - A regular area school classroom should contain a minimum of 620 square feet; however, this should not preclude the possibility of planning special rooms for large group lectures or for small group seminar purposes. Teacher desks and definite teacher assignments should not be made to each classroom. The use of the teacher office carrels will allow more freedom in scheduling classrooms.

Facilities - Each classroom shall have:

a. At least two (2) electrical outlets
b. At least 16 lineal feet each of chalkboard and/or tackboard space. In the case of demountable partitions, the entire wall may be a chalkboard or, by use of magnets, become a tackboard.
c. Movable furniture.
d. Shelving for reference materials.
e. Light control to facilitate the use of visual aids.

Commons

The commons is essentially an informal student center which may be regarded as the hub of the student activity; however, it may also serve as a part of the instructional program or cafeteria. The food service facilities can be used to train students in cooking, baking, and food service; therefore, more space between equipment is necessary for the additional people. An area of the school plant shall be provided where adult students may gather informally and where food is available from automatic vending machines.

Location - The commons should be located so that the cooking odors will not permeate through the entire building. The commons should have direct access from the corridors and should have convenient access from the outside. Lunch traffic should be planned to avoid interference from corridor to service area, to tables, to soiled dish return and to corridor.

Resource Center - An adequate resource center should be provided with study carrels and "learning center." Provisions should be provided for closed circuit T.V. and micro-film use. Additional study carrels should be planned with some equipped with audio facilities, others with visual facilities, and others for quiet study.

Physical Environment - The following should be provided in all commons:

a. Sanitizing devices for washing and sanitizing all dinnerware and utensils.
b. Sanitary storage facilities.
c. Adequate light.
d. Cheerful colors.
e. Good ventilation.
f. Sanitary conditions.
g. Proper acoustical treatment for quiet areas with aesthetic innovations.
h. Screens for windows and doors where required.

Vending Areas - Vending machines from which sandwiches and soft drinks can be procured should be provided. This permits the adult student who only wants a light lunch an opportunity to do so. It should be available for adult classes and "off-hour" coffee breaks.

Storage - There should be appropriate storage facilities for the food service and space to store cafeteria furniture when this area is cleared for student activities. Consideration should also be given to a satisfactory receiving area. The receiving platform should be so located as to permit direct access for the receiving of food and for the removal of waste materials.

Washroom - Toilet, washroom, and locker space should be provided near the kitchen for the employees.

SELECTION OF FURNITURE AND EQUIPMENT

In order to add the final touch to a building project, the proper furniture and equipment should be obtained. In most cases it will be necessary to purchase the equipment, but in some areas agriculture, business and industry may donate specific items. It would be a mistake to carefully plan and construct a building and then hurry through equipment and furniture purchase.

Identifying Furniture and Equipment

Several methods are available to the school district to help identify furniture and equipment. Listed among these methods are:

1. Advisory Committee's input for each program.
2. State standards and requirements list.
3. Experiences of other schools with existing furniture and equipment.
4. Local staff experiences.
5. Visitations to other schools and vocational centers.
6. Visitations to businesses and industries.
7. Reviews at national and state furniture and equipment displays at professional meetings.
8. Presentations by vendors and distributors.

Basic principles to follow when considering furniture and equipment selection are:

1. Durability
2. Flexibility
3. Vandal resistance
4. Comfort level for students
   a. High school and adult.
   b. Left handed and right handed.
5. Adaptability
6. Comparable to equipment and furniture found in typical businesses and industries.

Specifications

After the types of furniture and equipment have been identified detailed specifications should be prepared so vendors can participate in the bidding or quoting process. Sample specifications for a furniture item are as follows:[4]

Item	Quantity	Description	Unit Price	Total Price
1	24	***Lectern Desk Table*** - Desk shall be 24" W x 48" L x 30" High. Lectern section 24" x 24" adjustable to heights of 36", 38", 40" and 42" automatically locking at each height and equipped with pencil retaining ledge. Frame to be constructed of 14 gauge angles with 16 gauge 1" square legs and non-marring adjustable glides. Unit to be equipped with modesty panel on front and two sides. Top material to be plastic laminate with finished edges on all four sides. Chrome legs. Color to be selected from manufacturer's standards. Unit to be Smith System 12020 or equal.	_____	_____

Sample specifications for a piece of equipment are as follows:

Item	Quantity	Description	Unit Price	Total Price
1	1	***Audiometer*** to be a precision and portable unit, to have all transistor circuitry which is temperature compensated, recalibration accomplished with internal adjustable controls; quiet, rapid acting tone interrupter circuit - manually pulsed or continuous tone, to be battery operated, no current drain except when tone is presented, meter to indicate battery conditions, compartment for headset storage, seven frequency ranges of 250, 500, 1000, 2000, 3000, 4000, 6000 CPS, frequency accuracy within 2%, attenuator range of 0 to 80 db in 5 db steps, output calibration accuracy within 2 db of indicated level, double headphones (dynamic) type. Eckstein Brothers Audiometer #60 or equal.	_____	_____

After quotations or bids have been received, staff with input from Advisory Committee members should evaluate the items bid or quoted to see if specifications have been met.

Award of contracts and issuance of purchase orders should then follow based on the careful analysis of the specifications and bid documents.

FINANCING THE SCHOOL PLANT[5]

The financing of school building construction is generally the responsibility of local boards of education and the citizens whom they represent. Although some state and federal funds may be available for specific purposes, such as vocational building, few districts qualify for outside funding and all but a very small portion of school construction costs in Ohio must be paid for through local taxes.

Local boards may finance building construction either through bonded indebtedness or through pay-as-you-go financing.

Bond Issues

Bond issues are the most common means used by boards of education to finance new building construction. The major advantage of bond issues is simply that they make the needed funds available immediately. The disadvantage is that the available money is really borrowed and interest must be paid on it, usually for long periods of time.

The process works like this.

1. The school board submits a bond issue to the citizens for a vote.
2. If the bond issue is approved by the electorate, the board of education will sell bonds in the amount approved by the voters. Since the interest paid on school bonds is tax free, they are generally purchased by wealthy individuals, banks, insurance companies and other big institutions at a relatively low rate of interest.
3. The board of education uses the money it receives for the bonds to pay for the new school buildings.

4. The board of education uses the proceeds from the bond issue tax to buy back the bonds, a set number each year, until they are all called in. This process may take 20 years or more and interest must be paid on each bond until it is "bought back" by the board of education. However, inflation offsets the interest costs somewhat as the dollars paid back in the future are worth less than the dollars originally borrowed.

Bond issues are generally presented to the people in both dollar amounts and mills. The board of education may be asking for $1 million to build a new school. The county auditor will figure how many mills will have to be levied to pay back the million dollars plus interest over a period of so many years, generally 20. With the millage figure local property owners can then compute the initial cost of the bond issue to them if passed.

A very important point about bond issues is that the mills needed to pay them off generally goes down each year. This happens for two reasons:

1. As the valuation of property in the school district increases, the number of mills needed to produce the funds necessary to make the payments decreases. For example, if the valuation of property in the district is $50,000,000, 2 mills will produce $100,000 a year. If in the next year the valuation of property in the district increases to $55,000,000, only 1.8 mills will be needed to produce $100,000.

2. As the board only pays interest on bonds outstanding, interest charges decline with each bond paid off. As a result of this process, the payment on the bond issue declines every year. To illustrate, and using example 1, we may find a school district with a tax valuation of $50,000,000, bond payments of $100,000, and 2 mills in taxes needed to make the payment. The following year the property valuation increases to $55,000,000 and the payment drops to $93,000 because of reduced interest charges. Now the tax rate can and will be reduced from 2 mills to 1.7 mills.

A further point of interest about bonded indebtedness is that its limits may not exceed 9 percent of the total assessed value of property in the district. Many districts are constantly at the 9 percent limit and are prohibited by law from submitting bond issues for additional funds to their citizens.

Pay-As-You-Go——How Does It Work?

If a family has a 20-year mortgage on its home, it will probably end up paying double the true cost of the home because of the interest it must pay on borrowed money. It might be better off, assuming a low rate of inflation, if it could pay the entire cost of the home at purchase time and not borrow money. The schools are in the same position.

Some school districts, generally those in very wealthy areas or those in areas which are not growing substantially, can meet their needs on a pay-as-you-go basis. They pay for their new facilities as they build them. They pay no interest costs. Over a long period of time their schools will only cost about half as much to build as those in districts which use bonded indebtedness.

Pay-as-you-go issues are often called permanent improvement levies. They will be presented in terms of dollars (will raise $100,000 per year) or in terms of mills (2 mills per year). The millage rate allows taxpayers to compute how much the levy will cost them.

In some recent vocational construction, the multi-purpose levy has been used. Under this method a portion of the monies voted go for operating expenses and the remainder goes for building construction, purchase of equipment and payments of bonds and interest.

Another method to stretch the use of the school dollars is through matching funds, monies from state vocational appropriations.

After the construction phase has ended, schools use the operating funds voted by local citizens, state foundation payments, federal monies and other special project funds to continue the day to day operations of the school.

PLANT CONSTRUCTION OVERSEEING

In most construction projects the architect will provide a field representative to work with the contractor but experience has shown that the owner should also have a person appointed to oversee construction. The field representative may be on the site once a week or less in many cases. The representative of the owner can visit the site daily and report problems or concerns to the field representative or architect.

School Representative

It is important to follow the chain of command established because too many bosses can cause problems in the construction process. The representative of the school should attend the regularly scheduled contractor meetings and have the authority to make decisions necessary to keep the project on schedule. The representative must also have wisdom to seek additional input on major problems so delays or mistakes are not made.

A record of all meetings and transactions should be kept for future reference. The representative should be aware of:

a. Permits to be secured.
b. Compliances to specifications.
c. Coordination problems.
d. Business affairs and papers to be filed (Equal Employment Opportunity and Federal Wage Reports).
e. Procedures for change orders—additional costs or deducts.
f. Disputes between contractors and labor problems.

The representative can develop a good relationship with contractors and this cooperative attitude helps the project flow in a successful manner.

The representative of the owner should make notes and sketches which will also be useful to the maintenance staff. Exact location of certain mechanical equipment and building features may not be shown exactly on drawings and notes made by the representative can be very useful.

By having a representative on site at regular intervals the owner can feel assured that his best interests are being considered.

RENOVATIONS OF SCHOOL PLANTS

Some of the schools in major cities and communities are in a general condition of deterioration and decay. Their age and condition contribute to the out-migration of people to the suburbs, with their bright new buildings and their light, air and space.

While some city schools have continued to deteriorate, there have been actions to arrest and even to reverse the trend of general physical decline of urban areas.

In thinking about renovations of such existing buildings, many factors come to light. A school board of education should ask, "Is the renovation going to be costly? Will it be efficient and economical?"

The services of an architect should be obtained; if possible, consultation with the architect that initially designed the school.

Blue prints may be available and these would become vital in planning renovation. They would show the structure, the plumbing, the electrical system and heating system. With prints available, decisions could be made with regards to renovation.

Some concerns when a school board is considering renovation are: Will the foundations support another floor? Will the heating plant cover the new area? Are the electrical, plumbing, water and sewer lines adequate? These concerns must be answered before proceeding with renovation.

Renovation is necessary at times from the standpoint of maintenance. For example, deteriorated double hung windows could be retrofitted with maintenance-free aluminum windows to conserve energy and reduce vandalism.

Buildings from the past that are worthy of preservation can be upgraded to reflect the changing technology and educational patterns of today.

PLANT MAINTENANCE[4]

Maintenance of the school plant consists of activities required to repair school property, including grounds, buildings and equipment, and replacement of school equipment to approximately its original condition. The purpose of this section is to develop maintenance needs found in most school districts, and to point out how a planned maintenance program can be utilized to schedule properly the expenditure of funds budgeted for building upkeep.

Determination of Maintenance Needs

A sound maintenance program must be based on reliable information derived from several sources if budgeted funds are to be spent wisely. Maintenance needs are usually determined by:

1. Maintaining records of recurring projects.
   a. Labor costs.
   b. Material costs and source of supplies.
   c. Difficulties encountered in previous projects.
2. Maintenance requests from building personnel.
   a. Principals and teachers.
   b. Operational personnel—custodians.
3. Maintenance surveys conducted by qualified personnel using a planned survey check list:
   a. Supervisory personnel.
   b. Architects or engineers.
   c. Building contractors.
   d. Building principal.
   e. Head custodian.

Priority Considerations

It is important that priorities are assigned to maintenance needs to assure that all parts of the maintenance program are properly scheduled. Priority should be given to items that affect:

1. Health and safety of building occupants.
2. School programs.
3. Building structure and equipment, e.g., a leaking roof may damage ceilings, plaster and floors.

Maintenance Cycles

A good maintenance program will anticipate a large percentage of problems before they occur. Differences in locale, weather, age, and type of construction will play a large part in determining maintenance cycles.

1. Interior maintenance.
   a. Interior painting.
      (1) Standardization of colors throughout the school system will save dollars.
      (2) Consideration should be given to the use of flame retardant paint.
      (3) Epoxy paints provide surfaces that are easily cleaned and can be used in areas exposed to much soil.
      (4) Proper surface preparation will extend life of surfaces.

   b. Floor refinishing and cleaning.
      (1) Carpets should be spot cleaned as needed and shampooed on a regular basis.
      (2) Concrete floors should be resealed on a regular basis to help in ease of cleaning.
      (3) Tile and other floor surfaces should be cleaned, waxed or resealed on a regular schedule.

   c. Wall washing.
      (1) The washing of painted ceilings and walls on a regular basis will extend the painting cycle.
      (2) Many schools have found it practical to wash walls every year. This will vary with type of surface, location, and type of heat used.

   d. Mechanical equipment servicing.
      (1) The regular servicing of all mechanical equipment installed in a school building should be included on a preventive maintenance program. The regular cleaning of this equipment to remove accumulated dirt and dust will extend its service life.
      (2) Regular lubrication, supported by records, should be made part of the preventive maintenance program for all mechanical equipment.
      (3) Filters on heating equipment, air conditioners, and air compressors should be cleaned regularly and replaced as necessary.
2. Exterior maintenance.
   a. Roof parts—The service life of a roof can be extended by:
      (1) Annual inspection for damaged areas.
      (2) Inspection and repair of flashings.
      (3) Maintenance of gutters and downspouts.
      (4) Careful inspection of roof during construction.
      (5) Keeping roof drains clean.
      (6) Keeping debris from collecting on roof surface.
      (7) Coating roof on regular schedule.

   b. Masonry repairs—Expensive repairs to masonry walls and chimney stacks can be prevented by:
      (1) Tuckpointing open masonry joints exposed to weather extremes.
      (2) Silicone waterproofing solutions can be sprayed on walls to prevent moisture damage.
      (3) Caulking of joints around openings in masonry walls to prevent entrance of moisture.

   c. Exterior painting—All exposed wood and metal surfaces must be painted on a regular schedule which will extend the life of school buildings.
      (1) Insist on proper surface preparation.
      (2) Establish a standard list of factory mixed colors.
      (3) Make careful inspections during painting to be sure specifications are being followed.
      (4) Choose the best paint available according to the type of surface to be covered and extent of exposure to weather.

   d. Blacktop repair and sealing—Blacktop driveways and play areas should be resealed on a regular basis.
      (1) Sealing materials will protect the surface and must dry properly to prevent sealer being tracked into building.
      (2) Specify the proper base materials and preparation to prevent damage by vehicles.

   e. Sidewalk and curb repairs—Much concrete sidewalk and curb repair is done to remove hazards and can be planned on a long-range basis, based on annual grounds inspection.

   f. Landscape repairs—Turf, lawn, and planted areas should be carefully maintained by:
      (1) Proper mowing.
      (2) Trimming.
      (3) Replanting.
      (4) Replacing dead or damaged trees and shrubs.
      (5) Weed control.
      (6) Fertilizing.

Maintenance Emergencies

The ability to cope with emergencies is important to a good maintenance program. Personnel must be trained not to panic when confronted with situations that crop up daily. A leaking pipe may seem to be an emergency, when it may easily be valved off and repaired later as part of a routine operation.

1. Safety emergencies.
   a. Repairs to fire alarms, fire escapes, and fire extinguishers should be done immediately to protect building occupants.
   b. Leaks in a gas line, power failures, or danger from a falling ceiling are the typical types of emergencies that must be dealt with immediately regardless of cost because of the safety factor.
   c. A broken window could become an emergency item, especially if the glass is in an entryway.

2. Health emergencies—Health emergencies arise because of something unforeseen happening, such as:
   a. Failure of heating plant.
   b. Rupture of water main.
   c. Presence of noxious fumes in building.
   d. All food in the cafeteria becoming tainted due to failure of refrigeration.

3. Economic emergencies—Many times it is necessary to perform emergency maintenance to protect the school building from further damage. For example:
   a. A roof leak should be repaired to prevent damage to plaster and paint.
   b. A broken window should be repaired to prevent rain damage.
   c. A break in a water main should be repaired to keep utility costs down.

PLANT OPERATION

The purpose of this section is to define the operational activities concerning the housekeeping duties required to keep the physical plant open and ready for use. It includes cleaning, heating, ventilating, lighting, moving furniture, caring for grounds, and other housekeeping activities which are repeated somewhat regularly on a daily, weekly, monthly, or seasonal basis.

Operational Activities

The tasks assigned to the custodial or housekeeping staff are generally repetitive in nature and are accomplished according to a planned schedule.

1. Housekeeping
   a. Daily
      (1) Sweep all classrooms, stairwells, corridors, offices, laboratories.
      (2) Dust all horizontal surfaces.
      (3) Dispose of all wastepaper and trash.
      (4) Clean, wet-mop, and sanitize all restrooms.
      (5) Pick up paper, broken glass and trash from school yard.
      (6) Mop entranceways as needed.
      (7) Replace burned out lamps as needed.

   b. Weekly
      (1) Wash windows in entryways, doors, display cases.
      (2) Clean storage rooms, supply and boiler rooms.
      (3) Clean custodian service sinks.
      (4) Clean and polish all bright metal.
      (5) Clean drains and grease traps.

   c. Periodic or as needed.
      (1) Wash door glass and windows.
      (2) Scrub and rewax floors.
      (3) Wash walls and woodwork.
      (4) Vacuum drapes.

   d. Seasonal
      (1) Scrub, strip and refinish all floors.
      (2) Wash all furniture.
      (3) Wash all interior and exterior windows.
      (4) Wash walls and woodwork.
      (5) Wash light fixtures.
      (6) Wash wastepaper baskets and trash containers.
      (7) Clean carpets.
      (8) Wash lockers and storage cabinets.

2. Custodial services—Custodians will provide certain services to building occupants on a regular basis, such as:
   a. Preparing building for occupancy.
      (1) Unlock and open gates or fences.

(2) Unlock and open doors.
(3) Turn on lights in halls, entrances, and stairways.
(4) Start heating equipment in time to assure a classroom temperature of 68° 30 minutes before school starts.
(5) Raise flag.
(6) Turn on water for flush tanks.
(7) Inspect building for vandalism.

b. Meeting public.
(1) Meet and direct visitors.
(2) Serve as guard during public events held on school property.
(3) Receive materials from delivery men.
(4) Meet and work with contractors or service personnel working in the building.
(5) Accompany fire and health inspectors on building surveys.

c. Servicing washrooms.
(1) Fill soap, tissue, and hand towel dispensers.
(2) Empty waste receptacles often to eliminate fire hazards.
(3) Pick up paper from floor.
(4) Keep mirrors clean and remove "art work" from walls.

d. Receiving supplies.
(1) Receive and sign for all materials delivered to the school.
(2) Deliver materials to classrooms or storage areas.
(3) Insure security of supply storage areas.

e. Moving furniture and equipment.
(1) Arrange furniture for special events.
(2) Set up extra classroom furniture as needed.

3. Operation of mechanical plant—Proper care of mechanical equipment will prolong the service life and prevent the breakdown of costly equipment necessary to building operation.
a. Operation of heating, ventilating, and cooling equipment.
(1) Ventilating fans should be operated at all times when building is occupied.
(2) Heating equipment should be operated whenever it is required to maintain a classroom temperature of 68°.
(3) Daily inspection should be made of all safety devices on heating equipment.
(a) Check high and low water cut-off valve.
(b) Check pop-off valve.
(4) Air compressors should be operating at all times to insure proper operation of pneumatic controls.
(5) Air conditioning systems must be shut down and started up by qualified service personnel.
(6) Cooling towers must be drained each season to prevent freezing.

b. Cleaning of burners and boilers.
(1) Clean completely the firebox of all boilers after the heating season to remove accumulated soot and ashes.
(2) Brush out tubes to prevent soot accumulations.
(3) Remove soot and fly ash from boiler breeching and stack base after heating season.
(4) Clean burners on gas and oil fired equipment as needed to prevent soot accumulations.
(5) Remove unburnable accumulation from incinerators weekly.

c. Operating emergency equipment.
(1) Fire alarms should be checked weekly for proper operation..
(2) Fire extinguishers require annual inspection by qualified personnel.
(3) Fire extinguishers should be completely refilled after each use.

d. Servicing mechanical equipment.
(1) Lubricate all electric motors on heating equipment, unit ventilators, and central fan systems according to manufacturer's specifications.
(2) Change or clean filters on all heating units as needed.
(3) Drain moisture accumulation from air compressor tank weekly.
(4) Tighten belts on air compressors and fan drives as needed.

e. Relamping fixtures.
(1) Replace fluorescent tubes as needed to maintain lighting standard.
(2) Replace starter type tubes with rapid start tubes.

4. Maintaining sanitation standards—Strict adherence to sanitation practices provides a sense of security to the general public and to the building tenants.
a. Proper ventilation
(1) Operate ventilation fans at all times building is occupied.
(2) Prevent drafts by operating mixed air controls.
(3) Toilet rooms should be vented directly to outside air by positive pressure.

b. Use of disinfectants or sanitizers.
(1) All toilet rooms should be cleaned with a disinfectant solution daily.
(2) Food service areas should be cleaned with a sanitizer daily.
(3) Sanitize drinking fountains daily.

c. Waste disposal.
   (1) All paper, trash, or garbage should be promptly disposed of by container service.
   (2) Waste containers should be cleaned as needed to prevent undue odor or the attraction of vermin.
   (3) Waste containers should be placed in an accessible area.

d. Pest control.
   (1) Spray with insecticides for flies, moths, roaches, or silverfish as needed.
   (2) Contract with specialists for removal of bats, pigeons, termites, roaches, or mice as needed.

5. Upkeep of grounds—The quality of a maintenance program is often judged by the appearance of building exterior and its surroundings.
   a. Policing grounds.
      (1) Remove accumulation of paper and trash daily.
      (2) Broken glass or other safety hazards should be removed immediately.

   b. Snow and ice removal.
      (1) The removal of snow from entranceways and sidewalks is of prime importance to daily operation, second in importance only to heating.
      (2) Special attention must be given to removal of snow and ice from exits and fire escapes.
      (3) Ice melting chemicals should be used on steps and walkways for safety purposes.

   c. Maintain lawn areas.
      (1) Grass should be cut weekly or more often during the growing season.
      (2) Rake leaves and water lawn areas as needed.
      (3) Apply weed and insect controls with caution.
      (4) Fertilize lawn and shrubs as needed.
      (5) Trim trees and shrubbery in season.
      (6) Irrigate trees and shrubbery as needed.

   d. Care of blacktop areas and parking lots.
      (1) Sweep blacktop areas as needed to remove broken glass and trash.

6. Equipment servicing and operation—The proper care of powered equipment will extend its life and prevent costly breakdowns.
   a. Clean carburetor air filters as needed.
   c. Keep mower blades balanced and sharpened.
   d. Keep drive belts tightened to prevent undue wear.
   e. Drain gasoline from tanks after each season to prevent fuel system from clogging.

7. Plant security—The protection of plant investment from fire, theft, and vandalism is a prime concern of school personnel and is becoming more difficult to control.
   a. Fire protection equipment - There are three types of fire protection equipment which may be used in schools.
      (1) Detecting equipment, such as:
         (a) Smoke detectors.
         (b) Rate-of-rise or heat detectors.
      (2) Warning devices, such as:
         (a) Bells
         (b) Sirens
         (c) Horns
      (3) Extinguishing equipment, such as:
         (a) Portable fire extinguishers.
            [1] Carbon dioxide.
            [2] Dry chemical.
            [3] Chemical foam.
            [4] Soda acid.
            [5] Water
         (b) Fixed extinguishing system.
            [1] Automatic sprinkler.
            [2] Standpipe and hose.
            [3] Dry chemical system.

   b. Security alarms - Several types of alarm equipment are now used to prevent vandalism.
      (1) Electrical contact type may be used to protect certain doors or entry points.
      (2) Sound monitoring equipment may be used to protect entire buildings.
      (3) Radar type devices may be used to protect large areas by detecting movement.

   c. Use of floodlights - Lighting of buildings can discourage vandalism.
      (1) Illuminate entryways with floodlights.
      (2) Some corridor lights should be left burning.
      (3) Use floodlights in parking areas.

d. Building locks and hardware - The custodial staff should make daily checks for proper operation of security equipment.
   (1) Door hardware should keep doors tightly closed.
   (2) Locks must be kept lubricated.
   (3) Window locking devices must be secure.
   (4) Keys must be protected.

e. Vandalism reports - Reports of all vandalism should be submitted to the proper authority as soon as possible.
   (1) Report all damage done to buildings.
   (2) List missing equipment.
   (3) Report method of entry.
   (4) Report names of vandals apprehended.

8. Safety—Buildings must be checked regularly for removal of safety hazards and to insure the proper operation of safety equipment.
   a. Fire inspections - Trained fire prevention personnel should inspect all school buildings for fire hazards.
      (1) Check buildings for tidy housekeeping.
         (a) Remove trash.
         (b) Remove excess storage from basements, attics, and storage rooms.
      (2) Ventilate storerooms.
      (3) Control smoking.
      (4) Store flammable liquids in metal locker.
      (5) Check for overloaded electrical circuits.
      (6) Check fire doors for proper operation.
      (7) Store oily rags or dust mops in metal cans.
      (8) Insulate steam or hot water pipes.
      (9) Flammable decorations should be prohibited.

   b. Safety inspections - Ohio Industrial Commission Safety Inspectors will check all buildings at regular intervals for adherence to established safety standards.
      (1) Overloaded electrical circuits.
      (2) Improperly grounded electric motors.
      (3) Mechanical equipment not properly guarded.
      (4) Improper storage of fuels.
      (5) Boiler safety devices.
      (6) Building structure.
      (7) Cracked sidewalks or steps.

   c. Health inspections - Local health authorities will inspect buildings for:
      (1) Heating.
      (2) Lighting.
      (3) Ventilation.
      (4) Sanitation in restrooms.
      (5) Food service.
      (6) Water supply.
         (a) Quality
         (b) Quantity
         (c) Piping system
         (d) Heating devices
      (7) Waste disposal
         (a) Incinerators
         (b) Sanitary systems
         (c) Container service.

MAINTENANCE OF EQUIPMENT[1]

If students are to learn the skills of their chosen occupation at maximum efficiency, the tools and equipment in the laboratory should be in their best possible condition. Students cannot do good work with poor equipment. Neither will they develop positive attitudes toward the care and use of the tools of their trade if the tools in the laboratory are badly maintained. Student safety in the laboratory may well be jeopardized if electrical wiring is old and frayed, machine parts are broken or missing, or cutting tools are not sharp. There is a great deal of truth in the old saw, "A dull tool is a dangerous tool."

Inspections and Routine Maintenance

The teacher and class should be responsible for making inspections of all equipment in the laboratory regularly and frequently. In many cases the teacher and students will be able to provide routine care.

The purpose of routine maintenance is to prolong equipment life, prevent breakdowns, and keep things in top working condition. This is often called "preventive maintenance" because its purpose is to prevent wear and breakdowns rather than just repair out-of-order equipment. This may include such operations as regular lubrication, general cleaning, minor adjustment, replacement

of disposable parts (such as air filters), or sharpening of cutting edges.

Usually, the manufacturer of each piece of equipment will have worked out a maintenance schedule for it, and will have provided detailed instructions in the operations manual. These manuals become important parts of your maintenance files. Some equipment has very strict requirements for maintenance, even to the point of being subject to state or local law. For example, X-ray machines must be tested for radiation leakage and dosage at set intervals, and fire extinguishers must be recharged regularly. Air compressor pressure tanks should be drained of water on a scheduled basis.

Even with good maintenance service, some pieces of equipment have been known to break down. Minor repairs are frequently needed to keep the laboratory functioning. Belts will break, switches will become defective, and lamps will burn out. When this happens, it is important to get the equipment working again as soon as possible. There are few things more discouraging to students than to have their laboratory work frustrated by out-of-order equipment.

The teacher may make minor repairs if the teacher has the necessary time and skill, or they may be done by service personnel. In either case, steps must be taken to get the equipment back in operation quickly. It is often possible to make rapid repairs if a stock of common spare parts is maintained in the laboratory. The stock may include parts known to require occasional replacement, such as electric fuses, lamps, switches, drive belts, and hoses.

Major repair to equipment is another responsibility, though the actual work is almost always done by outside service personnel. The teacher must recognize the need for the service, then take steps to see that it is done. This may involve writing a repair requisition, calling in the repair service, and checking the finished job to be sure it has been properly done. It is up to the teacher to make sure that the job gets done, even if there are difficulties and delays due to required school procedures or busy repair services.

There is no universal pattern for designating who is to do the actual work of maintaining and servicing the equipment in vocational laboratories. The task is given to various persons or agencies, depending on the nature of the vocational program and the policies of the institution. Usually, teachers in every area are expected at least to do day-to-day inspection, general cleaning, and minor adjustments. If it is part of their occupational learning experience, students are often involved.

If the laboratory is highly specialized, there may be no one available to service it except a teacher who has the required knowledge and experience. Sometimes the teacher takes on such noninstructional service and repair work for additional compensation.

In larger institutions and school systems, the maintenance of common equipment is handled by the school staff. It may be done by the custodial staff, school maintenance staff, or the school system maintenance department. The work may be done whenever necessary without charge to the vocational program, or it may be charged against a budgeted amount. An internal request or school work order must usually be prepared and sent to the appropriate department to get the work done. The competence of the maintenance personnel, and the consequent quality of the service work, can be expected to vary widely.

Maintenance of the building and the laboratory facility itself is always the responsibility of the institution's or school system's staff. Such things as lighting fixtures, water coolers, ventilating fans, gas supply lines, and plumbing fixtures belong in this category. The teacher is not usually expected to provide service for these items, not do repair costs come out of the vocational program budget. Other items of equipment, such as electric conductors to machines (bus bars) or dust collectors, are not so clearly categorized and may be considered as building equipment or vocational laboratory equipment.

Commercial repair services are usually called in for major equipment repair jobs or for work on specialized equipment. Often this requires cost estimates and a special purchase order before the work is begun. Some vocational service areas, notably home economics and business and office, commonly utilize maintenance service contracts for their equipment. The school enters into a yearly contract with a commercial firm which undertakes regular specified routine maintenance, adjustment, and repair.

The Maintenance Plan

Maintaining the laboratory equipment will take less time and energy and will be more efficiently done if a maintenance plan for the laboratory is developed. Some extra effort will need to be expended to develop the plan and materials, but this will be repaid many times over the years. The maintenance plan will differ in content and complexity in each particular occupational specialty, but generally the development process will be the same for all programs.

The first step is to prepare a list of all the pieces of equipment in the laboratory that require regular maintenance of any kind. This includes large machines and small equipment or test gear. For each piece of equipment on the list, prepare a listing of the maintenance services required and the service interval (e.g., maintenance required once a week, at the end of each semester, after 100

hours of use, or when a specified condition is reached).

The information for determining service operations and intervals can be found in equipment manuals, or by asking other teachers who have similar equipment.

Maintenance requirements of school laboratory equipment is not always the same as that of equipment used in an industrial or commercial setting. School equipment may be somewhat lighter in construction, and school use may place different demands on the equipment than use in industrial production. You will want to follow the manufacturer's recommendations carefully, modifying only as experience shows is necessary.

It is very helpful to construct a maintenance file or maintenance handbook for the specific laboratory. This consists of a card or sheet for each piece of equipment with the necessary service operations and intervals listed. There should be spaces on the sheet for entering the dates that maintenance service was done, the initials of the person who did the work, and any remarks that will help you keep track of the condition of the equipment (e.g., "check oil level in gearbox next time," or "batteries replaced 9/14/78").

Other information on the sheet may include the name and address of the vendor or parts supply house, the name of the service person to call, adjustment specifications, or other pertinent data.

The maintenance sheets may be kept in a three-ring binder or the cards in a file box. The notebook format is particularly handy because it can be carried to the equipment and the operations can be checked off as completed. Once the handbook is made up, it will serve a long time, and any necessary changes can easily be made by adding or replacing individual sheets.

After the handbook has been produced, the next step in developing a maintenance plan is to determine who is responsible for each duty area. The teacher will probably reserve some specific tasks for himself, certain of the tasks may be delegated to students, other responsibilities can be covered by school maintenance personnel, and still others to outside commercial or industrial firms.

A list of the persons or agencies concerned with the equipment maintenance should be drawn up, and the responsibilities for each one assigned. Obviously, the assignments should be made in accordance with school policy and practice, and with the knowledge and agreement of the individuals involved. A calendar or schedule of equipment maintenance activities can be worked up, showing the dates on which the jobs are to be done and the persons or agency who are to do them.

In some school systems or institutions, it may be necessary to prepare a budget as part of the maintenance plan. If service and repairs are to come out of program funds, then adequate funds need to be set aside for this purpose. The budget should categorize the expenses (e.g., service by outside firms, service by school maintenance department, repair parts, replacement fluids, etc.) and estimate the amount to be needed for each category for the following school year.

The estimates can be drawn from the teacher's experience, the experience of other teachers, and/or the equipment suppliers. If there is a maintenance contract for service, that cost will be known and can be included in the budget. If possible, a contingency fund, calculated as a small percentage of the budget, should be included to take care of unforeseen circumstances. Each year, as the laboratory equipment increases in age, the maintenance budget should be increased to cover the cost of service and repair.

ROLE OF STAFF WITH THE PRESERVATION OF BUILDINGS AND EQUIPMENT

All staff must work together to insure proper use of buildings and equipment. The administrative staff and the maintenance staff cannot insure proper upkeep unless the teachers understand their role in this process.

Role of the Director/Principal

The director or principal sets the pace for the preservation of buildings and equipment. Responsibilities of the director/principal include:

1. Establish good working relations with maintenance staff.
2. Provide leadership in obtaining other staff cooperation in helping the maintenance staff—preventive measures to relieve the maintenance staff of long hours and extra work.
3. Secure adequate maintenance supplies and equipment.
4. Inspect the building regularly and help keep safety hazards at a minimum.
5. Provide inservice training of many types to help maintenance staff improve their services.
6. Supervise the renovation and upkeep of the building so that it is always in the best possible condition.
7. Cooperate with the staff in the education of students to eliminate the defacing or destruction of school property.
8. Provide appropriate punishment or penalty for the students who willfully violate rules and regulations related to the proper use of school property.

Role of Faculty and Staff

The faculty should work to develop pride in the building maintenance and cooperation is the best method to develop this pride. In turn, the maintenance staff must work to correct problems so the efforts of the teaching staff will be rewarded.

The teaching staff should look at the maintenance staff as members of the educational team and if this can be developed, the teacher will be more willing to help with upkeep of the building and equipment.

Teachers must enforce the rules and regulations on the upkeep of the building and equipment and follow through to see that students are disciplined if proper procedures are not followed.

Another important role of the teacher is to see that a report is made to the proper person if the building or a specific piece of equipment needs repair. The teacher who uses the room or equipment daily has the best opportunity to discover and report problems.

The director/principal must set a good example for the teaching staff and in turn the teaching staff must set a good example for the students and in this way the building and equipment can be maintained at a proper level.

CHECK LIST FOR FACILITY CONSTRUCTION[9]

1. Establish a long-range program of school building expansion based on birth records, anticipated community growth, school enrollment, business needs and labor market statistics.
2. Develop a program of community participation in both the anticipated and the present expansion program.
3. Employ an architect who is familiar with costs of construction and who can, in addition to designing, make a logical and honest cost breakdown of the entire construction costs.
4. Notify the architect in writing of the maximum funds available for the construction, either including or excluding his fee. Upon such notification, the architect should be required to stay within the allocation.
5. Set a definite progress schedule with the architect on the completion of all phases of the design and planning of the building which will run concurrent with the financial schedule.
6. Submit up-to-date birth rate records and charts, as well as average daily attendance (A.D.A.) records, for the architect's inspection and study so that he can recommend areas of expansion needed first.
7. If possible and more economical, have available for the proposed building a one-story site. A two-story site should be used only where feasible and more economical, as determined by conferences and cost breakdowns with the architect.
8. Where possible, orient the building to north and south light for classroom windows. Cross breezes will come with orientation. Investigate throroughly the claims of forced fresh air ventilation for classrooms.
9. Be sure that all plans of the proposed buildings are set and thoroughly studied before any elevations are set. Beware of being unduly influenced by spectacular drawings meant primarily to sell all bond issues. Sometimes, when such a method is used, the final product does not resemble the pictures because of the many changes in the plans which take place as the plans mature.
10. Investigate all materials to be used in the building while the project is still in the planning stage. Balance initial cost and minimum maintenance costs. Remember that good materials with low maintenance costs are cheaper in the long run.
11. In planning the building, develop numerous areas to be used as multi-purpose areas; idle areas in schools are costly.
12. Investigate insurance rates on several different types of construction and designs. It costs no more to plan to protect the lives of the students from tornado or fire, for example, when the building is originally built.
13. As soon as practicable, call in the financial advisor to work with the legal advisor and inform the architect of the amount of funds available.
14. Upon the advice of the architect, and in conformity with the time need of the new building, set up a definite construction operations schedule. Both architect and owner must always be aware of the seasons of the year when setting such a schedule. Make sure that this time schedule is in the specifications. However, if the architect calls for a penalty against a contractor for delay in completion of the construction, be sure that mention of a bonus is also included in the specifications for completion earlier than specified.
15. Keep all addenda issued during the bidding time at a minimum. Issuance of too many addenda indicates to the contractors that someone, either the architect or the owner, is not sure of the plans and specifications.

16. It is neither necessary nor advisable to have a contractor examine the plans prior to issuance for bidding; the architect should be qualified to advise the owner as to the cost based on his cost estimate. Other contractors may feel that a certain contractor has the inside "track" or is favored by the architect or the owner if such is the case.

17. Have the architect call for and receive substitutions for specified materials prior to the bid opening, not after the contract has been awarded. All contractors should be bidding on the same materials for the project.

18. See that the architect checks the number of contractors available and ready to submit a bid on the proposed project. Study published bidding schedules from plan agencies in order to arrive at the best time to receive the bids. Allow sufficient time or the job will tend to drag.

19. Keep the number of alternates at a minimum. Remember that an owner seldom receives full credit on deductible alternates as the contractor is prone to hold the profit instead of allowing credit for that item. If alternates are to be used, they should be additive only. Deductible alternates indicate that the architect is not sure of the cost estimate figure he has submitted to the owner, or that he has not kept pace with costs.

20. Remember that the lowest bidder is not necessarily the best, if specifications are not met. State law must be followed if the low bidder meets specifications. The architect should have available for the owner at the time of the bid opening a performance record of all contractors submitting bids. Sometimes performance records submitted by the contractors themselves prove to be unreliable. Not all contractors will submit unreliable records, of course, but many such cases are on record. The architect should secure confidential information on all contractors bidding the job before the bid opening date.

21. Avoid changes in materials or design after the contract has been awarded. During the design state give the architect a check list of basic requirements for the complete operation of the new plant so that he can incorporate them in the plans.

22. Insist upon a thorough foundation cost analysis by both the foundation engineer and the architect to determine the most economical type to use, since recent investigations into foundation costs have shown that bored footings are usually more costly than floating foundations.

23. If foreign steel is allowed on the job, insist on independent laboratory tests of each load of this steel to see that it meets the requirements of the building and the standards of domestic steel.

24. Where possible, use local materials, since the shipping in of similar materials is costly and does not add to the serviceability of the building.

25. Since classroom equipment of today is generally in a rectangular form, plan all classrooms in a rectangular form so as to utilize the floor space economically.

26. Eliminate all ornamentation from design, for ornamentation costs money and does not aid the educational program.

27. Use straight walls wherever possible since corners on the building perimeter always add to the cost. Projecting entrances may add to the design but they also add to the cost.

28. In some instances it may be necessary to change floor grades to obtain a more economical design. When changing grades, use ramps wherever possible, for they are more economical than steps and less dangerous to foot traffic.

29. Eliminate all parapet walls wherever possible and use overhangs, because parapet walls are expensive and the common places of leaks in a roof.

30. The use of overhangs aids the control of the sun. Windows can be opened during inclement weather for outside ventilation without causing damage to the interiors.

31. Gutters and downspouts are no longer considered necessary. Since rainwater must eventually reach the earth, it is easier and better to distribute this water rather than concentrating the flow at a given point.

32. Reduce the electric maintenance bill by using sky-domes or other means for daylight skylighting.

33. Keep outside wall thicknesses to a minimum consistent with building code requirements and good building practices.

34. Check with the architect on proposed ceiling heights since high ceilings are no longer considered either necessary or advisable. Additional heights over the required minimum are costly and do not add to the educational program.

35. Plan all interior cross walls to be non-load-bearing:
    a. To provide greater flexibility should you desire to move walls at a later date to accommodate changes in the educational program, and also because

    b. Load-bearing walls are more expensive than non-load-bearing.

36. Do not use plywood for the exterior surfacing of exterior walls because:
    a. This type will not give any better service than conventional types.

    b. Maintenance costs are high.

    c. Unless maintained properly, it will not last for the term of most bond issues.

    d. It is also a potential fire hazard for the student, and therefore,

    e. The insurance costs are very high.

37. If a boiler is required in the heating system, use modern metal stacks because they are more economical than brick and perform satisfactorily if code allows their use.

38. Because new developments in school heating systems have made boilers and boiler rooms obsolete except in unusual instances and conditions, investigate this item thoroughly and use the most economical system.

39. Except in areas of high corrosive action, aluminum windows are cheaper than finished steel windows because the high maintenance cost in periodically painting steel can be eliminated.

40. Eliminate screens on windows and doors; they are no longer considered necessary except in food-preparation and eating areas.

41. When using projected windows, have the top ventilator open at or close to the ceiling line, thus permitting removal of ceiling hot air and providing natural cross-ventilation.

42. If a two-story building is required, have the architect investigate thoroughly the use of ramps in lieu of stairs since stairs are costly and do not add to the use of the areas involved.

43. Figure all glass, whether plate or sheet, in multiples of 2" each way, because odd sizes not divisible by 2" are costly since you pay for the waste which goes into the scrap barrel.

44. Omit individual classroom telephones; they are expensive and no one can use them successfully during a class period.

45. Eliminate all cabinet work except the basic minimum. That installed by the contractor is usually more expensive than units which can be purchased from manufacturers.

46. Make sure that chalkboards and bulletin boards are designed to factory sizes. Leave the ends of the chalk rails open so that it will be easier to clean out the dirt and chalk dust. Most chalkboard manufacturers supply boards in heights of 3'-0", 3'-6", and 4'-0". Lengths are usually 6'-0", 8'-0", 10'-0", and 12'-0".

47. It is no longer necessary nor is it advisable to recess steel lockers into the wall construction. Sloping tops on free-standing hall lockers are much cheaper and require very little maintenance. Eliminate legs on lockers where possible. Set the lockers on an enclosed tile or concrete curb base, thus eliminating dust hazard under the lockers.

48. With the architect, thoroughly investigate all floor coverings to be used. Remember that asphalt tile is cheaper than vinyl tile and that similar designs are usually available in the manufacturer's stock. Terrazzo and tile floors are considerably more expensive than floor coverings and when wet can be a hazard. Carpet may be a good buy and useful in many areas.

49. Install panic hardware on all outside doors and enclose all stairs with fire doors. Use good hardware—it is more economical over a period of years.

50. Ventilate mop and cleaner compound closets to the outside and be sure that the walls are fireproof, for such areas always present extreme fire hazards. Ventilate all hot water heater closets to the outside and provide a door for servicing.

51. With the architect, make a thorough investigation of the use and the cost of acoustical treatment. It is not necessary to treat all areas of the building acoustically. Acoustical treatment is expensive when used improperly.

52. Investigate the cost of brick if it is to be used, for not all colors of brick cost the same. Face brick is more expensive than common brick.

53. With the architect, thoroughly investigate exterior wall panels, for they do not all cost the same nor do they all have the same insulating value.

54. With the architect, thoroughly investigate the costs and the maintenance if concrete tile is proposed for exterior walls. It is not cheaper, though the unit costs less than other comparable units, but the necessary labor and waterproofing makes the overall cost the same as, if not more expensive than, other materials.

55. Remember that steel doors are a partial fire stop—consider them in the overall project as a fire safety measure, even though the cost of finished steel doors is slightly more than that of finished wood doors. Maintenance on wood doors is higher than on steel.

56. Plan to have the students eat in shifts in a small dining room if a large room cannot be provided.

57. If metal toilet stalls are to be used, with the architect thoroughly investigate the type and the cost, for every manufacturer offers different designs with different costs.

58. Wall-hung toilets are more expensive than floor-mounted. Some will argue that maintenance costs are excessive for floor-mounted toilets but cleanliness must be maintained regardless of which type is used. To use wall-hung toilets for reasons of cleanliness and then to use floor urinals in the same toilet room shows lack of consistency.

59. Use prefabricated soil pipe outside of the building. It is cheaper than cast iron and where allowed by state law has been found to give satisfactory service.

60. Avoid use of floor-to-ceiling ceramic tile in various rooms such as toilet rooms. Use some other wall material above the wainscot line; it will serve the same purpose and be cheaper besides.

61. Ceramic tile floors in toilet rooms are clean provided that they are properly maintained at the joints. Mortar joints eventually give trouble. The use of waterproofed concrete is becoming increasingly popular in these areas.

62. With the architect, investigate the relative merits of fluorescent versus incandescent light fixtures. Fluorescent fixtures are more expensive in original cost, but in most instances they are cheaper to operate. Check all maintenance costs. In some areas such as the shop areas, consideration should be given to the use of mercury vapor lights which are also cheaper to operate.

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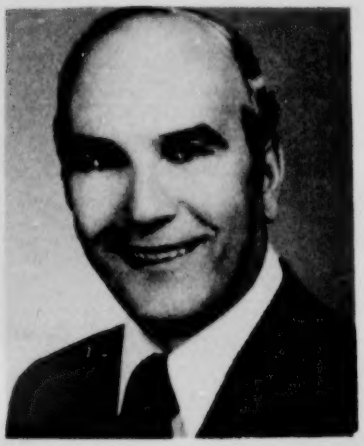

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CHAPTER IX

STUDYING AND APPRAISING THE SCHOOL PROGRAM

Harold L. Carr

USE OF PRIDE

For many decades prior to the 1960's, the various legislative bodies and publics had sought some form of information from the public schools which would illustrate the effectiveness of the schools. Except for spotty responses, the need for these groups "to know" was avoided. How effective the schools were was something to be kept to the schools.

The legislative bodies recognized the lack of evaluative data as they attempted to prepare legislation during the 1960's. To prevent this lack of information from occurring in the future, the legislative bodies began to single out categorically funded curriculum areas with forced evaluation and accountability.

The 1968 vocational education legislation set forth accountability requirements which could no longer be avoided in the vocational education setting. Ohio was one of the first states to move to fulfill this requirement. The Ohio response was Project PRIDE.

Project PRIDE (Program Review for Improvement, Development, and Expansion in Vocational Education, Guidance, and Career Education) was developed as a systematic review process of:

1. Establishing educational program objectives with sufficient clarity and explicitness to serve as the frame-of-reference on program specifications of strategic positions to be attained through the direction of effort and resources;
2. Translating the program objectives into analyzable educational program components or variables;
3. Developing criteria against which to judge educational program variables;
4. Determining decision-making information needs in relation to the educational program variables in a unique educational setting;
5. Designing methodology and techniques for obtaining, processing, analyzing, interpreting, and providing relevant and timely reliable and valid information in a format which fulfills the decision-making needs; and
6. Utilizing the information to meet accountability against the established criteria in a rational decision-making process.

The development of Project PRIDE began under the guidance of a statement of understanding agreed upon by all interested parties. The statement of understanding stated:

> The Division of Vocational Education accepts the responsibility to guide the cooperative design and development of a program review system as a prerequisite to program improvement as the basis for directed change in vocational education. Only through an adequate review of vocational education programmatic efforts at all levels can vocational education programs be described adequately for replication, diagnosed for strengths and weaknesses, validated for effectiveness, modified or redesigned for efficiency and judged for relevance and pertinence.
>
> The design of a program review system for vocational education must be focused on program goals and objectives at each educational level and is dependent upon several decisions which decision-makers must make. Therefore, the Division of Vocational Education views program review as a combination management information, planning and decision-making system designed to provide necessary information upon which decisions may be based and alternatives examined and selected.
>
> Program review is not intended nor designed for inspection or condemnation. It is planned for ***instructional program improvement.*** The Division of Vocational Education intends to participate in a non-directive role in each phase of program review as the most effective means of promoting instructional program improvement. The Division of Vocational Education will provide a basic structure, resources, and consultative services while involving personnel at all levels in the cooperative development and implementation of a program review system. Program review must provide a certain uniformity and standardization of information for decision-making at subsequent broader levels while maintaining local autonomy in administrative decision-making.
>
> The Division of Vocational Education also believes that the systematic study and analysis of

objectives and corresponding variables are best accomplished by those persons most closely involved with the vocational education programs. These persons will subsequently be responsible for rejection or implementing recommendations for change. Involvement of local vocational education instruction staff, administrators, vocational guidance personnel, curriculum specialists, labor and management groups, students and former students, parents, and others in the program review process fosters a commitment to program improvement and promotes a desire for change. This involvement also assures that results and findings of the program review process will be respected, accepted, and utilized in decisions relating to such items as redesign of instructional programs or the reallocation of resources to maximize the probability that objectives will be attained.

The program review activities will supplement and dovetail with other state reporting and planning systems to avoid conflict and duplication of effort.

The PRIDE program was developed by practicing vocational educators. The individual teachers and administrators came together to develop the instruments and procedures. This concept continues today as revisions and upgrades are made in materials and activities.

Local leaders of vocational education operations are basically familiar with the operational components of PRIDE, and can readily see that the original concepts of Ohio PRIDE are still viable today; that is, the components of involvement in development, involvement in the process, commitment of all involved, use of local parameters, and the many other elements.

The vocational education directors' leadership role is to take one of education's most controversial issues, evaluation, and make it a key part of program improvement. The review of the literature and examination of studies which form the base of the PRIDE system would assist the director in becoming more familiar with the underlying philosophy. However, in active leadership roles, the director may not have time for this in-depth study. So, one must move directly into the operational aspects to become familiar in the organizing for PRIDE, reporting and analyzing the results, and using the new information in program improvement.

The vocational setting must internalize Ohio PRIDE as a part of the local operation because PRIDE was developed as an integral part of the continuing programmatic effort designed to improve the quality of vocational education. One must look upon PRIDE as a comprehensive program review system designed to define, secure, and provide useful information relative to selected vocational education goals and objectives.

The components of Ohio PRIDE are (1) instructional program process variable review, (2) instructional program product review, (3) instructional program cost-analysis review, (4) vocational education organization and administration review, (5) vocational education availability and impact review, and (6) vocational education acceptance and congruence review. The information derived from the program review components at the local education agency level will be used for local vocational education planning and decision-making. Selected program review information will be clustered by the local education agency to form an information base for planning and decision-making at the vocational education planning district level. The information from the vocational education planning districts will be further combined to provide information for state-wide vocational education planning and decision-making.

One needs to become knowledgeable of the components of the PRIDE system. The ***administrative review*** is intended to provide the systematic study and analysis of factors and characteristics designed to facilitate the instructional program. Included in the review are such elements as administrative patterns, supervisory services, administrative support and leadership, involvement in program planning, advisory group utilization, staff scheduling patterns, communication channels, relationships with staff and administrators, logistics, and other organizational and administrative aspects which have potential consequences for the attainment of vocational education goals and objectives.

The ***process variable review*** is intended to provide a systematic study and analysis of those factors or characteristics within the vocational educational instructional program which can take differing values or that can occur in varying amounts and which have direct effect upon the attainment of program objectives. This review includes the curriculum and instruction, facilities and equipment, instructional staff, and student elements of the instructional program. The process variable review also includes the review of guidance and adult education programming.

The major purpose of the ***product review*** is to assess and interpret the actual outcomes of the instructional program as defined in terms of stated objectives. Product review may occur at any time during a program or after completion of the program and serves the adjustment decisions; that is, product review provides information related to the selection of alternative programming through the observation of actual outcomes. Elements included in product review are achievement or competence testing; attitude change, job placement, job adjustment, job progression, and other significant indicators or factors which serve to provide decision-makers with information on the attainment of stated objectives through

observation of the actual product.

The concept of an ***acceptance and congruence review*** is based on providing information to serve allocation decisions. The acceptance part of this combination term relates to the individual and societal acceptance of alternative vocational education priorities and allocations, thus, vocational education. The congruence part relates to the agreement of priorities and needs. These two components are combined to form a review system component intended to provide decision-makers with information to use in determining how to utilize resources based on the acceptability of alternative priorities and their correspondence with identified needs. Acceptance and congruence review comprises the systematic study and analysis of such factors as individual interests, parental aspirations, community attitudes, potential cost of alternative priorities, utilization of existing facilities and staff, consequences of alternative priorities, and the ordering of needs.

Cost analysis review provides decision-makers with information necessary to assess investments in terms of maximization and justification of benefits and cost-utility. Cost analysis review includes such factors as per pupil expenditure of the vocational education programming intended to meet selected priorities, supervision cost, depreciation, and other cost-utility factors as well as non-monetary and non-economic benefits. Cost analysis review then provides decision-makers with information estimating the value of existing programs for a justification of priorities and allocations or a transfer of priorities and allocations to maximize the resources in terms of benefits to individuals and society.

Availability and impact review is the second combination review system component. The two concepts of vocational education program availability and impact are intended to serve the kinetic decisions; that is, within the on-going or dynamic process of vocational education this review provides the vehicle for ascertaining through observed outcomes the degree to which vocational education programmatic efforts are meeting the needs of the state. Availability and impact review must address itself to but not be limited to the analysis of national and state-wide occupational needs, the number of occupational programs and their geographic availability, state-wide enrollments and matriculation from vocational education programs, and the economic impact of persons completing vocational education programs.

The PRIDE review components are used in each vocational education planning district (V.E.P.D.) on a five-year cycle. The V.E.P.D. participates in the review process during a given year and the generated reports are utilized for program improvement work and review during the next four years. Therefore, it becomes extremely important to all that the PRIDE review be as effective as can possibly be managed. Only in this manner will the process fulfill its intent.

Organizing for It

The vocational education director is the leader in the PRIDE review. The entire activity pivots around this position. The director must be prepared in every facet of PRIDE so that leadership can be provided for a successful project. *The five operational phases include (1) organization and pre-planning, (2) local self-review, (3) state supervisory review, (4) V.E.P.D. report, and (5) follow-up.*

The organization and pre-planning is the director's first major area of concern. The director must orient the superintendent and board of education and obtain full support; that is, a commitment beyond mere approval of the project. These persons must see the process as a tool for program improvement and not as a mere outside requirement. It is the director who must see that these persons understand the importance of PRIDE within the total operational scheme of the district.

Before the director can provide proper leadership, the director must be fully knowledgeable of the PRIDE system. It is not the intent here to provide the director with all of the material needed to carry out a PRIDE review. The intent is to encourage the director to learn the system as an effective part of instructional program improvement. Beyond this overview, it is the director's responsibility to complete the work necessary to provide leadership in the system.

After the administrative-board commitment is made, a local plan for the PRIDE process must be developed. The director should start with the state manuals and become thoroughly acquainted with these directions. After this review, the director must translate everything into the local plan. (See also *Local Strategies* in this chapter.)

The local plan must provide for ***time.*** The local activities must be planned with time available for all persons working with the process. This part of the local plan as other parts should include the involvement of all personnel. Don't hand the workers a finished plan—involve them in the total process.

Careful selection of local leaders will add strength to the PRIDE review. Service area review coordinators will be key persons since they will be working directly with the instructional program chairpersons. Consider each leadership role carefully and select the proper persons. After selection of the leaders, it will be necessary to adequately train these persons prior to the supervisory orientation meeting.

The director's leadership in organization and pre-planning will keep the process moving in the proper direction and will prevent others from leading the process in undesirable directions.

The director must also plan for the selection of the self-review committee persons. These persons will be evaluating the vocational education programs. They must have characteristics which will enable them to do an effective job. The director must review these people in light of interest, willingness to serve, confidence other persons have in their judgment, ability to communicate, knowledge of field of work, knowledge of employer requirements and needs of employees, and a knowledge of the needs, interests and aspirations of students.

The director's local plan must include the preparation of materials needed by the review committees. The staff must be involved in developing this material and requires a great amount of time and effort. However, it has been shown that the outcomes are well worth the time and effort. The vocational education director cannot pass these leadership roles to another—it is up to the director.

The communications and visibility plan for the local review must set up the public information network and give recognition to the persons involved in the process. This part of the plan will also carry the review through the information dissemination process.

The local vocational education director will not be able to do all of the tasks required for an effective review. Leadership of others is the director's key. Proper preparation of all persons will be an important element of that leadership.

Reporting results

After organization and pre-planning for PRIDE, the actual activities of self-review will be conducted. The results of these activities will be reported in the PRIDE reports. The director must plan for these reports so that the recommendations and priorities will be in proper alignment for the district. The PRIDE report is not a pre-determined report but a guided and directed report from the input of the review committees. Each person must be recognized in the report, but the placement of these comments within the overall recommendations and priorities becomes one of local leadership. Keep all of the individual documents as source documents. Someone will want to refer to something later in the process.

The individual program reports will be prepared by the program review chairman. The state supervisory staff will visit each program with the local service area coordinators and make comments on the individual reports. The program reports, with state supervisory comments, will form the basis for the service area reports. The placement of recommendations and priorities in each of these reports will determine the direction of the vocational education program.

The service area reports will form the source documents for the V.E.P.D. report. The V.E.P.D.report will set the o[illegible] for vocational education within the V.E.P.D. It must be remembered that the review process is a local process and local adjustments to the process make it fit the uniqueness of the local setting. The vocational education director will need to guide these adjustments. The local adjustments will reflect resources, opportunities, conditions, and problems within the local environment. Characteristics of the local community must be included as all reports according to current and emerging local uniqueness and be balanced against the broader state-wide needs.

The process of local adjustment in procedure and reporting will serve as a stimulating force to make the PRIDE review a local process designed for definite and designed program improvement.

The communications plan should include all media use of the PRIDE reports. However, all information should be released to the board of education prior to public release.

Using results

The written PRIDE reports will need to be analyzed by the board of education with administrative assistance. The administration and board must then put the many recommendations and priorities into the overall district action plan. This workable plan must have full commitment of the staff and board of education. Remember that the process means nothing until the recommendations and priorities become the definite plan of the district for program improvement.

The vocational director will have management responsibility in developing the implementation plan from the PRIDE review. However, the task of putting findings into practice will not be overly difficult if prior commitments were obtained. This implementation plan will provide the director with a four-year plan of improvement for vocational education.

Implementation of recommendations from the individual program reviews should be communicated to the committee members who did the review. If you cannot or do not plan to implement recommendations, then communicate this to committee members with the reasons for not implementing. The people involved in the process need to be continually involved after the review. The PRIDE communications plan should provide for all such items prior to the start of the PRIDE process. In this manner, the director will not inadvertently miss some important contact.

The local educational district will be required to implement recommendations from the PRIDE review. It becomes easier to do this if you plan for it

rather than having a change ordered by an approving agency. Implementation will, of course, be based on the priorities established in the PRIDE review after consideration of resources available.

The PRIDE program is a locally involved process and the use of the PRIDE results must continue as local initiative. Plan the use of results into the total format from the original pre-planning and the implementation stages will be accepted by all.

A follow-up visit by state supervisory staff will be held the year after the PRIDE review. During this follow-up visit, the local district will receive help to plan further for implementation of the PRIDE recommendations. The staff will also seek documented evidence of progress throughout the V.E.P.D. The V.E.P.D. report will form the basis for the follow-up visit, but the individual program instruments will remain the primary source documents.

Subsequent state supervisory visits will also be made in relation to the individual program PRIDE reports. These visits coupled with continued work of the local committees will tend to insure implementation of results and the reports will not die on the shelf.

The program review system is in place to assist the vocational director in program improvement, development, and expansion. The vocational education director must learn the system so that it becomes an effective tool in the overall operation of vocational education. The results of the PRIDE activity will provide the local program with most of the information necessary to plan for the future and improve the quality of vocational education.

For further information on the PRIDE review system, the local vocational education director should contact:

James H. Price
or
Robert Balthaser
State Department of Education
Division of Vocational Education
Ohio Departments Building 904
65 South Front Street
Columbus, Ohio 43215
(614) 466-2095

NORTH CENTRAL ASSOCIATION OF SECONDARY SCHOOLS AND COLLEGES EVALUATION

Since 1895, the North Central Association of Colleges and Schools has been accrediting schools under set policies and standards. The North Central Association is a voluntary association of member secondary schools and institutions of higher education. The member schools share a common purpose through the North Central Association; that is, the improvement of education through cooperative efforts based on established policies and standards.

The Association, with over 3900 member institutions, also provides workshops and related training activities. In addition, the Association provides a strong voice on prime educational concerns for members in the nineteen-state region.

Vocational personnel who have held positions in comprehensive school districts are familiar with the North Central evaluation and accreditation process. This process, application, comprehensive self-study and on-site visit, remains intact as has been known through the years. Changes do occur as policies, standards, and evaluative instruments are updated to reflect the school in the current society. The current instrumentation and procedures will continue to serve vocational education in the comprehensive school setting.

More recently, the North Central Association (NCA) has developed "Policies and Standards for the Approval of Vocational/Occupational Schools." To be eligible for NCA accreditation under these policies and standards, the school must have as its major institutional purpose the operation of vocational/occupational programs, but not grant credits for Associate of Arts or higher degrees. While the school's primary concern must be with vocational education, it may provide supportive subjects. Further, the school must offer a broad choice of vocational areas and not be limited to a narrow choice. These new policies and standards are designed more closely for Ohio's joint vocational school districts since the school does not have to issue a diploma in its own name to be eligible for accreditation if it shares its students with other high schools. The new policies and standards provide that while the primary purpose must be secondary level vocational education, the school may also offer post-secondary level non-degree components.

The vocational directors in the comprehensive schools have and will be required to continue to provide leadership in North Central evaluation processes. Vocational Education will be a part of the overall evaluation and the local vocational education directors should assume major departmental roles. (***NOTE:*** *The NCA will accept the PRIDE self-study in lieu of the NCA self-study in Ohio comprehensive school districts. However,*

vocational directors should seek to be a part of the total NCA evaluation for the school so that vocational education can be involved in the overall input to the total evaluation.)

The joint vocational school director should become familiar with all aspects of the new NCA policies and standards for vocational/occupational schools so that leadership can be provided for adoption of the accreditation. The director will need to obtain support of the faculty, the superintendent, and the board of education. The director's own personal knowledge, convictions, commitments, and expectations will play important roles in determining how successful the effort is in bringing NCA accreditation to the vocational school.

NCA accreditation can strengthen your efforts for continuing improvement of programs and instruction and can provide a viable link with other vocational schools in the nineteen-state region. Such accreditation is open to any joint vocational school that (1) applies for membership, (2) fully meets and sustains the standards established by vocational educators for vocational schools, (3) undertakes a self-study and school evaluation (the PRIDE review will fulfill parts of the self-study) and (4) is approved for membership by the Commission on Secondary Schools. The vocational school's accredited status extends for one school year and is renewed by submitting an annual report indicating that the school continues to satisfy the established standards. The current annual NCA membership fee is $125.00.

There are a few conflicts with NCA standards and the Ohio operational format, but these can be worked out with the state NCA committee and the vocational school. The NCA flyer entitled "Partners in Quality—The Occupational (Vocational) School and the North Central Association," gives the following advantages of NCA membership. You will have to evaluate each of these within your own operation.

1. Membership conveys to the general public and the profession that the school is seeking quality program and is committed to ongoing improvement.
2. Accreditation assures students that they are receiving worthwhile education and preparation and that their credentials will be widely accepted.
3. Membership makes the school a working partner in the formulation of standards for the enhancement of occupational education within the NCA region.
4. By bringing the member occupational school into closer professional contact with the wide range of secondary schools, a valuable cross-fertilization of ideas and understanding can take place.
5. Membership can help the school command greater local support to assist it to move forward to broader educational goals and to reach NCA standards.
6. Membership in this broad-based association can be helpful in resisting undesirable external pressures.
7. Recognition by a voluntary organization with the stature of the North Central Association enhances the status of the school itself and of occupational education in general.
8. Greater cooperation between the traditional high school and the occupational school is cultivated by shared membership in the Secondary Commission. Moreover, better articulation between the occupational school and post-secondary institutions can be fostered by NCA membership.
9. Innovation, change, and renewal in occupational education are actively encouraged by membership in NCA through its standards, evaluation, and workshops.
10. The total school evaluation required for NCA membership invigorates educational improvement within the school, bringing teachers and administrators together in the pursuit of common purposes.
11. NCA membership promotes a wider acceptance of the unique philosophy and intents of occupational secondary education.

Is North Central accreditation for your vocational school? This decision is one of the director's leadership responsibilities. It is the feeling of this writer that the advantages justify the effort, and we in Ohio, as leaders in the nation's vocational education program, should take a leadership role in NCA.

As you will notice, we have not addressed the policies and standards as time and space will not permit a full coverage of these. However, so that the director may have a ready reference for review of NCA, included below is the topic listing of policies and the topic listing of standards with the Qualitative Principle for each. These have been quoted from "Policies and Standards for the Approval of Vocational/Occupational Schools, Revised for 1978-1979." Also, the director will want to review copies of the Annual Report Form for Vocational/Occupational Schools, Annual Report Digest, and Report on Professional Staff. These materials will be helpful in the decision-making process and leadership role of becoming familiar with NCA.

Topical List of NCA Policies

Policy I:	Definition and Delimitation of Vocational/ Occupational Schools
Policy II:	Non-Discriminatory Selection of Students
Policy III:	Period of Accreditation
Policy IV:	Review of Annual Reports by State Committees and the Commission on Schools
Policy V:	Accreditation and the Composite Effectiveness of the School
Policy VI:	School Evaluation
Policy VII:	Innovative and Unusual Programs and Designs Deviating from These Standards
Policy VIII:	Classification of Schools for Accreditation
Policy IX:	Candidacy Status
Policy X:	The Responsibilities of State Committees and the State Chairman

Topical List of NCA Standards with Qualitative Principles

Standard I: Institutional Purpose

A school has the responsibility for serving the educational needs of its students as they prepare for life and work in a democratic society. In order to establish priorities, assist decision-making, and provide an effective basis for comprehensive and continuous evaluation, each member school shall develop and maintain a written statement of the major purposes and general objectives to be sought through the educational program.

Standard II: Organization, Administration, and Control

Effective board/superintendent relationships shall obtain. The school shall have administrative and supervisory personnel adequate for effective operation of the program. The administrator of the vocational/occupational school shall have the necessary autonomy and authority to provide the leadership needed to accomplish the improvement of instruction with the staff. The school shall be organized to assure the achievement of its stated purposes.

Standard III: Instructional Program

The instructional program shall be designed to impart knowledge and develop skills, assist students in learning the processes and procedures of the current business and industrial cultures, and develop attitudes, interests, and values essential to the successful functioning of an individual in a democratic society. Special emphasis shall be placed on preparing students for the World of Work.

Standard IV: Administrative and Professional Staff

The school shall be staffed by administrators and teachers who are well qualified in professional, subject matter, and technical skill areas, actively encouraged by the school system to support their competencies, involved in those areas of decision-making affecting the school program, and teaching under conditions favorable to good morale.

Standard V: Instructional Materials and Equipment

The equipment and materials used in vocational/occupational education programs shall be of such quality and quantity as to provide the realistic experience necessary to develop skill competencies in specific occupations/occupational clusters.

Standard VI: Extra-Classroom Activities

Each member school shall maintain a diversified and balanced program of extra-classroom activities - whenever appropriate - designed to make a positive contribution to the educational development of students. Efforts shall be made to foster an appropriate intellectual, cultural, and social climate; promote growth in student leadership and social interaction skills; and encourage special student interests.

Standard VII: Student Personnel Services

Balanced and comprehensive student personnel services shall be provided for all students, particularly for those unable to gain maximum benefit from usual school experiences without specialized education programs. In combination with its

participating schools, the occupational school shall provide the guidance personnel, facilities, and materials required to meet satisfactorily the specialized needs of its students.

Standard VIII: Institutional Adaptability

A member vocational/occupational school shall be so organized as to provide maximum opportunities in occupational education for its students at a reasonable cost. The school should be close enough to the student's home so that he may take advantage of the opportunity without undue sacrifice. The school shall foster experimentation and innovation designed to adapt the institution effectively to changing conditions and objectives in occupational education, relating program performance to meeting the needs of the students enrolled.

Standard IX: Instructional Media Program

A coordinated instructional media program shall be organized so as to make accessible a wide range of media to instructors and students. In addition to receiving, storing, retrieving, and displaying information in various forms in a mediated learning center and at other locations such as classrooms and laboratories, the center shall make available equipment and personnel for the production of a wide range of media. The program shall be developed in such a way as to support instruction through appropriate facilities and through professionally and technically prepared staff.

Standard X: Financial Support and Control

The school community shall provide financial support in sufficient amount to maintain high standards in staff, facilities, and materials needed to accomplish the school's purposes.

Standard XI: School Facilities

The vocational/occupational school shall be so located and constructed as to provide the appropriate setting for the development and successful operation of a program which affords desirable occupational secondary education for all people desiring such training, regardless of age. The site, the building, and all operations shall assure that the health and safety of those served by the school are properly safeguarded.

Standard XII: Evaluation

To obtain information for use in improving the occupational education program, services, and activities, each member occupational school shall make a planned and continuous evaluation of the effectiveness of its program in accomplishing the objectives and outcomes upon which its staff and board have agreed. Continuous evaluation shall often be made of the vocational/occupational school's long-range and annual program plans as coordinated with those of the participating schools. Analysis of program effectiveness shall include study of the interrelationships of student characteristics, the educational process and student performance on the job after completion of the program.

Standard XIII: Adult Education

The changing social and technological climate of our society mandates high levels of understanding and technical skills for many of our people. Since educational experiences which are meaningful in the regular secondary school program are not always suited to the needs of adults, the North Central Association endorses and encourages the development of adult learning opportunities in vocational/occupational schools to accomplish and maintain occupational competency and other desirable adult educational goals within the limits prescribed by local governing boards and the state plan.

As more information is needed on the North Central Accreditation or if help is needed in reviewing the NCA, contact the Ohio State Chairperson.

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NATIONAL STUDY OF SCHOOL EVALUATION

In 1933, The Cooperative Study of Secondary School Standards was formed. The work of this study has continued through the years, and in 1959, the name was changed to The National Study of Secondary School Evaluation. In 1969, the name was changed to the National Study of School Evaluation so that the study could give attention to the evaluation of elementary schools and district-wide organization.

This organization has developed many effective instruments for evaluation of public schools. The work of the organization has been carried on by a General Committee composed of appointed representatives of the six regional accrediting associations in the United States.

The materials of this group are used to provide direction and instruments for conducting the self-evaluation study and the evaluation by the visiting

committees. The materials are quite broad in nature and must be adapted to the individual setting. You may be able to adapt several items of this group to your own individualized evaluation format.

As the local vocational education leader, you should be familiar with these materials. Some of the more valuable items for the vocational setting include:

"Secondary School Evaluation Criteria"
"Student Opinion Inventory"
"Teacher Opinion Inventory"
"Parent Opinion Inventory"

These may be obtained from:

National Study of School Evaluation
2201 Wilson Boulevard
Arlington, Virginia 22201

AVA VOCATIONAL EDUCATION ACCREDITATION

The American Vocational Association is presently working out an accreditation process for vocational education. A national study committee has been named but has not met at this time.

Vocational education directors in the State of Ohio will want to stay in contact with this project as it moves ahead. The input from the directors should form the basis for the work of this study group but the directors must stay current with all activities of the study group. Sometimes these activities move too rapidly without the necessary input. The vocational education directors must actively participate in the process to obtain the proper outcomes.

USE OF THE SCHOOL SURVEY

The school survey is a double barrel survey. First, it involves the user who has needs to be met within the educational programs and, second, it involves the ones using the output of the educational program.

The vocational education director will be using both types of studies on a continual basis. Students and adults must be surveyed to determine needs and interests and the business and industrial community must be surveyed to determine direction of vocational education programming.

The school survey is a projection tool for the vocational educator. The need for specific occupational or population information upon which to base the continued development of vocational education becomes more acute each year. Each district has a need for an objective view of itself to serve as a base for dealing with the vital educational direction.

The vocational director will have to be the one to provide leadership in developing student or community surveys. The PRIDE program will fulfill most of the needs of the local education agency. However, specific studies will occupy at any time. The director must be prepared to manage these studies.

It is the purpose here to alert the director to some of the items which must be considered in any survey generated by the school district.

Origin of Purposes and Objectives
Survey purposes will differ for each study. Purposes and objectives must be carefully determined and clearly stated to guide the survey. The procedures for determining and stating the purposes and objectives involve a recognition and analysis of the problem.

Scope of the Survey
The scope of the survey must be clearly outlined. The specific geographic areas to be covered, the specific occupational areas, or a particular segment of the population—the local need will determine the scope.

Sponsorship of the Survey
The most successful surveys will have sponsorship from the agencies involved. The home school must sponsor a survey of students. A business group must sponsor a survey within a specific occupational field.

Plan of the Survey
A detailed plan of the survey needs to be developed. This will include a pre-planning committee, a general steering committee, working committees, publicity committee, and the report preparation committee. In smaller surveys, these functions may be covered by a single person. The point is—a carefully prepared plan is required.

The Survey Staff
The survey staff, whether a single person or a group of people, must be properly trained in the survey techniques and data collection materials.

Time Schedule

A definite time schedule is required to keep the survey moving.

Survey Instruments

Many forms will be required to conduct a quality survey. These forms should include only information needed for the study. Also, the materials need to be professional in nature.

Data Summary

Provisions must be made for data tabulation. This should be designed into the original concepts of the survey.

Conclusions, Recommendations and Reporting

The conclusions must parallel the general purposes and specific objectives of the survey. Conclusions must be formulated before recommendations can be made. Recommendations are directed at goals which are achievable. All information of the survey should be reported while significant data can be separated so that it becomes immediately apparent to all.

Use of the Data

A survey should not be conducted if it does not generate some action on the part of the school district. If the data were not needed to do something, the data should not have been collected.

The survey is useful to obtain many facts needed for management decisions. The vocational education director must become familiar with the survey technique so that it can become another viable tool in the study and appraisal process. Many resources are available, but the key to success is careful planning and involvement.

USE OF ADVISORY COMMITTEE

Vocational education personnel have utilized advisory committees throughout history to bring practical experience and firsthand knowledge of the occupational areas into the classrooms and laboratories.

The reasons for including citizen advisory committees in the study and appraisal of vocational education should be clear. First, the person affected by the educational program should have a part in the study of the program. Second, since these persons will be evaluating the program anyway, based on the product, an advisory committee provides a systematic way of guiding the study and appraisal.

Another important reason for using the advisory committee is two-way communications. The information from the advisory committees will help in formulating input in each phase of program operation. The citizens need to know what is happening in the school and the school needs to know what outcomes the people feel should be attained.

The willingness to serve on an advisory committee is an indication of interest and desire to serve the school setting. These citizens realize that they are in an advisory role and have no administrative or legislative authority. However, the leadership of the vocational education director will be required to maintain such a relationship. The director must see that the advisory committees are used and not simply named.

A general or over-all committee is highly important as a tool for total systems input. Individual curriculum and/or topic committees are equally important for specific topics. Every committee must function under a statement of policy developed by the board of education. Typical items in this statement should include the purposes and functions of the committee, number of members, method of selecting members, length of members' terms, and communications procedures.

Membership considerations should include employers, employees, parents, former students, students, and community members at large. These persons should have an interest in the school and the vocational education program; a willingness to serve and give time to committee work; confidence of the community; ability to communicate; knowledge of the occupational area; and a knowledge of the needs, interests and aspirations of students.

Within the study and appraisal framework, advisory committees can be utilized for such activities as appraisal of facilities and equipment; interpretation of data regarding outcomes of programs; identify and describe occupational education needs; advise on data-gathering instruments for community use; and assist in the formulation of objectives for the vocational programs. The committees should also be used to assist in the development of sound and adequate policies on vocational preparation or to formulate recommendations for improvement or expansion of programming or to interpret programs to the community.

Each member of a committee must be carefully selected and then appointed by the board to represent the citizens and not an organization or business. The vocational education director must then provide leadership to train the persons for most effective input.

The committee should be formally organized with chairman, vice-chairman and recording secretary. School representatives should do the

liaison work for the committee and meet with the committee to provide staff input. Regular meetings should be held with pre-planned agendas. The school representative to the committee will be largely responsible for the comittee success. This person should serve as an ex-officio member and as previously stated, serve as the consultant or liaison.

Organizing and using advisory committees for study and appraisal is a time and effort consuming task. Such time and effort is justified if the committees are managed properly and the outcome is effective.

The local director should prepare a list of approved practices for working with advisory committees in vocational education. This list should reflect the uniqueness of the local setting and coupled with the board policy will become the operational format for the committees.

Advisory committees are valuable tools in studying and appraising the school program. Plan for them, use them, and recognize them.

SELF-EVALUATION BY STUDENTS

Self-evaluation by students can be a useful way to determine the effectiveness of the vocational education programs. However, the frame of reference for the student is somewhat limited. The vocational education director must carefully develop materials and evaluation formats if this scheme is to be used.

This type of program study and appraisal must be directed at process and performance objectives. These objectives will form the criteria for assessing the effectiveness of the program for the individual student.

To accomplish such a process, the broad program goals and objectives must be broken down into the more specific performance and process objectives. The student must then be given a criterion against which to judge these objectives. This will be an arduous and demanding task. If the staff does not plan this activity with a great deal of finesse, the procedure can be of little benefit. However, if placed within the total evaluation system of the district and planned and managed effectively, it can be a most valuable tool for program improvement.

The local vocational education director may wish to consider the use of a consultant to assist in the development of a student self-evaluation program. On the other hand, expertise may be available in the building.

If the school continues on its own, the development of the objectives against which to evaluate will be the most crucial step. The objectives must be broken down to quantifiable or behavioral terms. They must be stated precisely and outline the set of responsibilities that relate to the objective. Further, the objectives must describe how a particular action is to be completed and with what effort.

The objectives must also be designed to describe what is to be done, how it is to be done, and with what degree of acceptability. The objectives must not confuse the students by conflicting with one another; that is, the students must clearly understand the place of each objective. Further, the objectives, to be used for measurement standards, must be consistent with what is intended in the way of educational output. This means breaking down the parts of the program so that the student can review each individual element without a confusing mix of items.

The objective statements must be well balanced to force a review of all elements and not concentrate on only selected areas of the program. The objectives must also provide for individual differences so that the students can judge how unique abilities and responsibilities are being handled in the instructional program. The students must also understand the organizational constraints as they evaluate programs against objectives.

With well established criteria in the form of well-phrased instructional objectives, the students can provide a good review of the effectiveness of the instructional programs. Again, the vocational education director cannot assume that this will just happen. It must be well planned and executed.

Many other forms of student evaluation have been used across the United States. Some relate to opinion inventories in which the students are asked to react to the pre-developed list of statements. Others have been comparison evaluations where students compare various program elements with other instructional programs. Others have been "How well you're doing" type of evaluations. Others have been expectation type reviews. The point is that the use of students in program evaluation is as varied as the number of instructional programs. The key is to develop the system so that the students have the criteria against which to judge. If the review criteria is not established, the results will be so varied that the results will be basically useless.

The vocational education director must study self-evaluation by students to learn the necessary concepts required to implement and administer an effective program. In addition to the study and appraisal of the school program by students, the director will want to examine the students' self-evaluation of individual achievement. This can be done in the same manner as overall program appraisal but directed toward the individual

student.

Whatever method of attack the director chooses, the plan must be written with the involvement of all to be affected by the program. The thoroughness of the plan will determine the usefulness of the system.

FOLLOW - UP APPRAISAL BY SCHOOL GRADUATES

Most vocational educators look at the follow-up as a component used to determine the present position and wage of the former student. The thinking must be broadened beyond this concept to include effective feedback for program improvement.

The Educational Amendments of 1976 have set the stage for a change in the format of the vocational education follow-up. The follow-up now must include such elements as employer satisfaction, student success and job adjustment, and job advancement for not only the program completer, but the progam leaver.

This type of appraisal component is being planned and developed as a part of the PRIDE review system. This component will be integrated into the 1979-1980 PRIDE reviews. It will include employer contacts and completer-non-completer contacts. These contacts are designed to generate data needed to fulfill local and state requirements as established in the 1976 amendments.

In addition to the PRIDE component, which is designed primarily as an employer review, the vocational education director will surely want to include direct former student appraisal of the instructional programs. This type of study must be designed to provide information needed for program improvement. Therefore, the system must be designed by those who will be affected by the results of the follow-ups. All of the known elements of evaluation will be required in this system as they would be included in any system development.

There can be no precise and definite procedure that will apply to every school since each system will have its own unique characteristics. Whatever form the follow-up takes, it will be designed to measure the impact of the educational process on the future actions of former students in such areas as job performance, adequacy of preparation, job satisfaction, or job advancement.

Again, the pre-planning will be the key to a successful follow-up appraisal component in the director's tool box of study and appraisal techniques. Operational outlines for any evaluation component have been given in other sections of this paper so they will not be repeated here since these elements apply equally to all evaluation components; that is, what to study, time and resource allocations, administrative plan, interviews, questionnaires, what information is needed, what groups will be included, and the many other factors.

One needs to take a moment to examine the thinking the director will be required to do to effectively put together a good follow-up evaluation. For the purposes here, we will assume that it has been decided to use the interview technique to gather the study data. What factors are required to assure that this technique will be successful? The following represent some of the training which must be provided to the interviewers.

1. Know the objective of the interview. What facts or points are to be considered in the interview.
2. Develop a cross-section interview list from the total group.
3. Secure as much information about the interviewee as is possible. This will be used to establish rapport and better understand responses.
4. Arrange for an appointment with the interviewee to show your consideration and importance for the person's time.
5. Test-run the interview instrument on several persons.
6. The interviewer's prejudices and attitudes must not be allowed to influence the interviewee's reactions and responses. The interviewer must learn how to react to the interviewee's attitudes and temperament. The interviewer must maintain composure and feel relaxed while showing interest in the individual.
7. Establish rapport with the interviewee and be sure that the person understands the purposes of the interview. This will help the person react as openly as possible.
8. Stay within the appointment time commitment.
9. Send a letter of appreciation to the interviewee. This will help assure that the interviewee will help under similar circumstances.
10. Evaluate the effectiveness of each interview with a pre-prepared interview checksheet.

As one can see from the simple outline above that all elements of any evaluation study require a tremendous amount of planning. But, if the planning is not done, the results will not be worth whatever effort has been expended.

Also, the vocational education director must plan to use the results of the follow-up appraisal as rapidly as possible. These changes should be communicated to those who contributed to the study. Remember, information gathered for information's sake irritates everyone involved and interferes with studies when real information is needed.

TEACHER SELF - EVALUATION OF THEIR OWN PROGRAMS

Teachers in the field of vocational education need to be particularly cognizant of the need to make appraisal or evaluation of results a functional part of the total planning and improvement process. It will be the vocational education director's responsibility to illustrate to the teacher how this appraisal process will increase the effectiveness of the vocational program and improve the expertise of the teacher.

This self-evaluation system, as all other components, must be grounded in goals and objectives and represent an integral part of the total teaching preparation. The system selected for periodic and continuous use will need to be a criterion based system to establish standards against which to judge program effectiveness. The system will rely upon the skill, intelligence, and capabilities of the teachers to supply the basic data and the understanding and competence of these individuals to interpret the results.

It is the recommendation of the writer that the vocational education director consider using the PRIDE procedure and instruments for self-evaluation by the teacher. However, many different schemes can be effectively implemented to fulfill the unique characteristics of the local setting.

For example, one method may be to have the teachers prepare a thorough curriculum outline for the program with stated process and outcome objectives. These would then be broken down into time periods for short and long range use. The teacher would then keep a daily log of what was taught in relation to the process and outcome objectives. The next step would be to compare this with the tests to examine the correlation of each.

Many times it is found that either the tests become the curriculum guides without any real correlation to the "real" curriculum, or that there is no correlation between the stated curriculum, what is taught, and the student evaluation program.

The vocational educatio personnel are sometimes quite surprise when a given curriculum is examined in terms of what is actually being taught in the classroom. This may be a good place to start with teacher self-evaluation; that is, to determine the actual curriculum taught in the program. The differences betweeen the developed curriculum could be affecting student success in the labor market.

In designing the locally effective system, one should recall that student characteristics, program characteristics, and other intervening influences produce the actual outcomes. Therefore, all characteristics must be examined to determine any cause and effect relationships.

A review of evaluation models and evaluation literature will assist the director in acquiring knowledge necessary to provide leadership in teacher self-evaluation. Such terms as formative evaluation (designed to aid in the process of developing or improving a program with a comparative base within the same program), summative evaluation (designed to estimate an operational program's overall effectiveness with a comparative base between two or more programs), experimental evaluation (designed to control certain factors in experimental groups for comparison with other groups), interrupted time series evaluation (designed to measure outcome fluctuation in a time series), or regressional analysis (designed to account for variations in program outcomes that are related to differences in student characteristics and other intervening variables) will become a part of the director's tool box.

The director has the pivotal role to play in evaluation. This person has responsibility to stimulate activity, to facilitate communications, and to provide consultation with the teachers. Additionally, the director must assure that some reasonable minimum amount of information is collected for descriptive and evaluative purposes. All of this with the intent of program directed change and improvement.

US OF COMPETENCY BASED PERFORMANCE TESTS

A competency base performance test is a form of product evalu .on; that is, how well we have performed th assigned task. The we becomes both the st dent and the teacher coupled with the entire arr y of institutional factors which play for and aga.nst the student's learning.

All competency based performance tests are criterion-referenced or objective-referenced tests. In theory, such a test would only show how well the learner has developed in a given skill; it would not measure one learner against another according to norms or percentages.

The vocational education staff should be experts in the development and use of performance tests. But, too often the "competency based" part is left out. The objectives were not adequately defined at the start to allow for competency based performance testing. In these cases, we have stayed with paper and pencil tests which relate to the students' knowledge of the occupation but not the skills of the occupation.

Since competency based performance tests are based on behavioral objectives, it is important that the vocational director be able to provide leadership in the development of behavioral objectives. Simply, the behavioral objectives tell

what it is that one will have to do when evaluated, the conditions under which it must be performed, and the level or quality of performance expected. The evaluation of this definition of the behavioral objectives becomes the competency based performance testing.

As the director can see immediately, the task of developing behavioral or performance objectives and then the related testing becomes a very, very time consuming task. But, there is no other way to effectively ascertain the performance ability of the student. The emphasis is on the behavior the learner has acquired rather than how he acquired the ability to perform the skills. There are many skills to be learned and a variety of knowledge that one must accumulate to meet program objectives. However, the behavioral objective does not specify or limit how one is to go about acquiring the knowledge or skill. Performance based testing must then be coupled with other types of evaluation to fully account for the educational program.

The development of performance tests will require not only the preparation of behavioral objectives, but will first require a task or activity analysis of the occupation. Naturally, both of these should have been done for every occupational area within the vocational education setting. I am afraid to say that this is not the case. Therefore, the work is before us. With the task analysis converted to behavioral objectives, the vocational educator has the criteria performance information necessary for not only curriculum development, but subsequently competency based performance skills. The primary job then becomes one of sequence of behavior within both the curriculum and the tests.

Competency based performance tests are not readily available and, therefore, must be locally developed. This will provide the most effective tests just as any locally developed evaluation component would best serve the local need. But, the tests will not be developed without the leadership of the vocational education director.

The vocational director does not have to start from isolation. The best starting point in the development of the performance testing package is the Ohio Vocational Achievement Tests. This series of tests has been developed through occupational tasks/activity analysis and will form a base for performance test development as well as a complimentary related knowledge test series.

The Ohio Vocational Achievement Tests are designed for the student to solve problems, analyze data, recall specific facts, have a knowledge of principles, react to generalizations, be able to use abstractions in specific situations, and put together parts to form a complete structure. All tests are based on the technical knowledge of the given occupational field. These tests are designed with the end result of instructional program improvement and that is what we are after.

If the vocational director is interested in obtaining more information on the Ohio Vocational Education Achievement Test Program to form a base for competency based performance tests, the director should contact the office below.

Instructional Materials Laboratory
Trade and Industrial Education
The Ohio State University
1885 Neil Avenue
Columbus, Ohio 43210

USE OF OUTSIDE CONSULTANTS

As one can tell from the overview descriptions of the selected evaluation topics which are given in this section, it would be nearly impossible for the vocational education director to be fully knowledgeable of every facet of program, process, and product evaluation. Therefore, the director's leadership role will include the appropriate use of outside consultants to study and appraise the school program and its effectiveness.

Information needed in some way for program improvement or adjustment may come in many types. Some relate to the local situation that should be considered when making decisions to add, delete or modify vocational programs. Some relate to various aspects of the process, the constraints or input, and may need to be balanced against other information concerning the quality and quantity of output. The techniques required to get at this information will be as varied as the information.

It is at this point that consultants with particular expertise can be of help to the vocational director. The director may need assistance in behavioral objective development, in industrial complex review, in test development, or any of the many areas of program study and appraisal. The consultant should be brought in as soon as the director realizes that help is required. Don't mess up the system and irritate people and then bring in a consultant to straighten out the problems. Real intelligence is knowing when to seek help to move the process in an effective manner.

Consultants cost money, so the overall evaluation plan must provide for this resource allocation. Consultants also come in every size, nature, and attitude. The vocational director will have to select carefully.

The consultant's expressed expertise must be reviewed and ascertained by the director. Get references and follow-up to see that the consultant can do what needs to be done. Also, determine that the consultant's philosophy fits that of the school system. The director does not want the problem of

a conflict of philosophy during an evaluation effort.

The director must know how to use consultants. This will involve developing the local consultant plan which detaiis what is to be contributed, how and on what time line. Then the director must work with the consultant without interference. The two positions must support each other for effective development of any study and appraisal effort.

The wise use of consultants can make the director's leadership role an easy task. Plan to use them and plan for their use.

LOCAL STRATEGIES

A locally directed study and appraisal of vocational eduction presupposes that the initiative and operation of such study and appraisal is a responsibility of the local school district and that leadership for it is to be provided locally. Participation in the state-wide evaluation is to be expected to strengthen the whole of vocational education, but the primary focus is on locally directed evaluation.

Why locally directed program study and appraisal? The answer to this question is that an evaluation ought to be done by those who are directly responsible for improvement of the educational programs. This process is designed to make judgments and involves primarily the determination of the extent to which previously established goals and objectives are being or have been attained. The advantages of a locally directed evaluation is that the persons involved are those who must subsequently implement recommendations.

A difficulty which sometimes arises is that the vocational educators may be so close to the operation that they fail to sense some of the important elements to be examined, or the significant needs to be explored. Others may feel a lack of necessary competence in analyzing and interpreting what is present.

One of the princples of acceptance of evaluation is that those who are to be affected by a study and appraisal effort and those who will be the beneficiaries of change which may result should be those involved in the process.

Programs are being evaluated on a daily basis by many persons. Sometimes perhaps informally or indirectly. What the local district must develop is a local strategy to guide and direct a systematic, organized approach to the study and appraisal of the educational program.

One of the early questions will be the scope of the study and appraisal. This will be determined by the purposes set forth by the local district in its overall strategies; that is, what is to be studied and how. For example, the study should not be limited to the present program offering because there may be important needs of instruction in other areas in terms of employment opportunities and/or interest of the school community.

The local strategy must also be concerned with more than the product. The input or process develops the product, and, therefore, must be a part of the study effort.

Another essential element in the local strategy must be administrative and board commitment. This commitment must go beyond mere sanction or endorsement. The persons involved in the study must have assurance that they have support for their activities, that resources are available for the activities, and that serious consideration will be given to the findings and recommendations.

The vocational education director forms an important part of the local strategy because the directors will provide the leadership required to carry out the study. The director must have recognition and professional respect to lead the group.

The element of involvement must also be a part of the local strategy. Involvement must include definite assigned responsibilities. Involvement must include staff, students, and particularly citizens affected by the vocational programs. Persons are more likely to accept and support recommendations if they have been actively involved in the development of the recommendations.

The local strategy must include time for staff members, students, and citizens to do the required work. Appraisal activities will require added hours of work to gather data, do interpretations and develop recommendations.

Training of leaders and staff personnel will also be an important element of the local strategy if the project is to be successful. Also, a communications plan must be developed prior to the project. This plan must include the appropriate media. The viability planned in the project strategy will encourage those working on the study and will pave the way for acceptance of the recommendation.

The local district may also desire to include consultants in the overall strategy. Consultants may be required in particular areas of expertise. However, consultants should be carefully selected to delineate tasks and not to do the study and appraisal.

Whatever the study task, the strategy must be developed in detail and in written form so that all understand. Whether the local district is studying student attendance, parental attitudes, student interest, job placement, industrial needs, or any of the other many facets of vocational education, the plan should include but not be limited to the following:

1. Objectives of the study.
2. Scope and duration of the project.
3. Resource plan.
4. Organization and function of staff members.
5. Organization and purposes of the citizens groups in advisory capacity.
6. Proposed major activities to be conducted.
7. Schedule of activities.
8. Plan for disseminating and implementing the recommendations and/or results.
9. Evaluation plan for the study itself.

The local vocational education director will provide the leadership in any study and appraisal of vocational education. Therefore, the director must be prepared to develop the local strategies required to carry out a successful project of study and appraisal. The local situation will dictate the strategy, but key items should not be missed in any detail work.

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Dr. Harold L. Carr

Harold L. Carr, with a background as a high school vocational education student, began his teaching career at the university level and subsequently advanced to secondary level vocational education. He is recognized as a practitioner and has served as vocational guidance counselor, guidance department director, dean of men, principal, director of planning and development, vocational education director, and assistant superintendent. His industrial experience has varied with concentration in the manufacturing and machine tool areas.

Dr. Carr received his Bachelor of Science and Master of Science degrees from Southern Illinois University. He earned the Doctor of Philosophy from The Ohio State University where he was Document Analyst and Editor of the ERIC Clearinghouse on Vocational Technical Education at the National Center for Vocational and Technical Education. Fields of study included vocational education, research and development, educational administration, and higher education administration.

Dr. Carr has served in the State Department of Education, Division of Vocational Education, as Supervisor of Evaluation Programs and presently serves as Superintendent of the Great Oaks Joint Vocational School District.

CHAPTER X

COMMUNITY RELATIONS AND COMMUNITY PARTICIPATION

Dr. R. N. Adams

INTRODUCTION

As schools provide educational services, there is a need for the active involvement of the community. The businesses and individuals within the community provide the resources required for the operation of the school. This investment in education subjects the school to external influences and constraints. The effectiveness of the school is closely correlated to the supportive participation of the community. School personnel must be responsive to the community as they strive to deliver quality education at an acceptable cost.

Communications between the school and the community should result in mutual understanding of shared purposes. Effective educators engage in activity which will facilitate two way communications.

Quality communication results from a comprehensive planned program. It is primarily a matter of promoting a continuing participation of the community in the development, review and evaluation of school activities and conditions. Communication should involve the faculty members, staff members and students. Communications properly conducted will serve as the lubricant for successfully implementing decisions.

Effective community relations cause problems to be identified and action to be supported. Improvements are realized and shared with others by the informed persons who are involved in the development of the school. The structure of the school may facilitate or hamper the communicative process which promotes positive community relations. The structure of the school is composed of individuals who must listen as well as speak, and who must read as well as write. Quality community relations require leadership, knowledge and commitment. The major test of any school is the effectiveness of its communication system. Communication is prelude to action.

RELATIONS WITH TEACHERS AND OTHER STAFF PERSONNEL

For several years changes have been occurring in the way people within an organization relate to each other. Orders, communications, policies, and decision making have become the mutual concern of the superordinate and the subordinate. People are human and should be treated as such. People should participate in making decisions that affect them. No organization has more to do with people than schools.

Human relations are manageable. Directors of vocational education should lead, not follow, in initiating personnel practices that recognize the worth and dignity of individuals. The administrative style of the director should provide for individual and group participation in decision making. The human factor in educational management is of prime importance. The majority of the director's professional relationships are with individuals who have ideas, who can share in planning, and who have the ability to participate in the management of the school. Effective personnel relations result from the participative approach to management.

Good relationships are often blocked by ineffective lines of communications. The director should have an organizational plan for the dissemination and gathering of information. Components of the plan could include bulletins, general meetings, conferences with individuals, committee sessions, newsletters, staff meetings, advisory committees, and public announcements. Whatever techniques are used, the effectiveness of communication between the director and the staff is crucial in producing high morale and a productive school operation. The success of the director will depend upon his/her ability to work with and through people.

The director must be able to demonstrate enthusiasm and help subordinates accept common goals. The director makes resources available to the staff and establishes clear instructions to accomplish desirable results. Commitment and cooperation are secured through persuasion rather than threat. New ideas and constructive changes are encouraged. Through these activities the director must remember to remain employee and goal oriented. The attainment of goals is dependent upon the commitment and ability of the staff.

RELATIONS WITH STUDENTS

Students expect an education which is purposeful, significant and comprehensive. The director must insure a quality education for students as a foundation for his/her relationship with them. Students have the right to participate in the educational process by being represented in the making of decisions that directly affect them. The director should provide a means for students to routinely and directly confer with him/her. These conferences should include planning and problem resolution activities. Students, as the persons affected the most by decisions of the director, should be genuine participants so they will recognize that they are real contributors to the educational process. The director must allocate time to listen to students' concerns, to understand their problems, to work with them and to guide them without destroying their initiative.

One of the best ways for director-student interchange of ideas and information is a comprehensive student government organization. For maximum benefit the director must serve as the primary advisor. The student council, in conjunction with the many leadership clubs, can have a major positive impact on the instructional program.

Another practice many directors have found to be of value is the student advisory committee to the director. All of the benefits of advisory committees are manifested in the student committee advising the director. Communications are greatly enhanced by the utilization of such a committee.

For student councils and student advisory committees to be successful, it is important for the director to clearly identify the limits of jurisdiction and authority within which the groups are expected to function. The director can not delegate authority in areas of school administration, like enforcement of discipline, which should be retained by the director.

RELATIONS WITH PARENTS

Maintaining a cooperative working relationship with parents is an essential element of community relations. Creating arrangements which encourage participation in the school program by parents will result in promoting a more effective school. Adults have a substantial obligation to contribute to the welfare of their children. When given an opportunity, practically all parents will assist the school in helping the student. When there is little communication and contact between the parent and the school, frequently the parent accepts the student's observations with little questioning and chastises the school instead of working with school officials. The director shares with other administrators, the responsibility to encourage and arrange the development of a cooperative relationship between the school and parents.

Education is so closely related to parental interests that educators could not prevent parental involvement even if they foolishly try to avoid it. Parents will be involved in the education of their children. The director should help them to do so constructively.

Frequently parents are willing to serve as volunteers in the school, yet few directors take advantage of this opportunity. Parents can provide valuable support services and disseminate accurate information to community residents regarding the quality of education being offered.

Even the best pupil progress report (grade card) is one way communication. It can only partially convey the school's objective for a cooperative school-parent relationship in providing quality vocational education. Parent-Teacher conferences that are planned well and conducted effectively are more valuable than written evaluation. The conferences often result in developing rapport and generating a higher level of cooperation. The parent-teacher conference enables the participants to share their common interest in the education of the student, which facilitates the expansion of cooperation, communication, and understanding.

The director's role is to provide time in the school calendar to free the teacher from the recitation schedule in order to conduct the conferences. In addition, some standardization of format must be incorporated as guidelines for conducting the conference. Many teachers may need some inservice education regarding the appropriate techniques to be utilized. Other teachers may need some encouragement as quality parent-teacher conferences require time, planning and effort. Parents and teachers need to be cognizant of the purpose of the conference. Good news and less desirable information should be shared with parents. Due to some parents being reluctant to attend conferences for a variety of reasons, the teachers need to arrange appointments with each set of parents at a time mutually convenient. The director should facilitate the making of appointments and insure appropriate arrangements for welcoming parents and guiding them to the appointment are available. Students should understand the nature of the conferences to avoid unwarranted conditioning of parents prior to the conference.

The home visit is an invaluable tool for the educator who uses it wisely. Vocational educators have developed home visit procedures which contribute to an effective parent-school relationship. Such visits demonstrate to parents the school's interest in the student and inform them of the educational services offered.

Home visits are time-consuming and somewhat expensive. Arrangements should be made to minimize the time and cost factors. Mileage reimbursement and careful allocation of time can effectively reduce any negative impact.

The director should not assume all teachers are competently conducting an effective home visit. Careful preparation of teachers will avoid problems and promote a maximum positive effect.

RELATIONS WITH BUSINESS, INDUSTRY AND LABOR

Representatives of business, industry and labor must be involved in the planning, development, and assessment of vocational education programs. Involvement is necessary if vocational educators seek their support and assistance. Maximum effectiveness and efficiency of vocational education programming will not occur unless these people are committed. (The term employment sources will be used to include the combined representation of business, industry and labor.)

An effective procedure to insure practicality of instruction, resultant in preparation for employment, is to organize and utilize advisory committees. In many school districts the initial involvement of the employment sources is a result of advisory committee participation. However, the development of mutually supportive relations between the school and employment sources should not be limited to advisory committees.

The director must assume the responsibility of serving a liaison function with employment sources. The director should develop contacts with key persons and maintain a cooperative working relationship with them. This requires the director to leave the school campus and spend some time at the employment sources. These visits will contribute to the director being able to better perceive contemporary working conditions and requirements for student employment upon graduation.

In addition, the director should allocate time to invite key representatives of the employment sources to the school campus to alert them to needs for assistance and impress them with areas of success. If comprehensive involvement and support of employment sources are to happen, it is imperative that the director has excellent rapport with important representatives. Cooperation must be achieved on a consistent and long-term basis.

The director is the essential factor contributing to the degree of successful involvement of employment sources representatives. He/She needs to establish contacts, arrange appointments, invite persons to the school, organize and conduct meetings involving the staff and the employment sources, administer the cooperative activities, and coordinate follow-up activities.

The director must remember that the promise of involvement without the reality of meaningful activity is extremely detrimental to the continuation of assistance by the employment sources. A lack of planning and coordination by the director will result in little effective cooperation by the employment sources and eventually deteriorates into no productive activity.

Data about the kind and quantity of employment opportunities available in the employment sources must be obtained by the director. He/She should become acquainted with manpower needs of the community labor market and have a general knowledge of regional needs for personnel. Due to the effective use of on-the-job training by vocational educators, many employers have an inordinate number of requests for placement of students. Employers are contacted for instructional materials, guest speakers, field trips, employment opportunities and other services for the school. All of these activities have merit. Teachers should be involved in these areas. Unless a system to coordinate these endeavors is designed and implemented by the director, chaos and a substantial decrease in cooperation will occur. The possibility of this happening, along with the paramount importance of continuing assistance and support of the employment sources, mandates a systematic approach to preventing the problem rather than constant reaction to negative situations.

Effective liaison with key representatives of the employment sources will have a "ripple effect." The informed, supportive representative will endorse the school to his/her associates and family members who will speak highly of the school to his/her associates and family members. Of course, the force dissipates with each circle of endorsements but with enough key persons endorsing the school it soon becomes "common knowledge" that the school is productive, contemporary and responsive to the needs of the employment sources.

RELATIONS WITH PARENT-TEACHER ASSOCIATION

Some schools have active Parent-Teacher Associations. Most of the parents with children enrolled in vocational education are not active or do not have such an organization available. Consideration of starting such an association would depend upon local factors; however, the constructive potential might warrant initiation of such a group. A major advantage of an active parent-teacher association is the continuous interaction of school personnel and parents' meetings, exchanging ideas and working on problems which hinder educational progress.

In seeking the assistance of the parent-teachers association, the director must be aware of some of the problems he/she may encounter. The authority of such groups must be clearly delineated and there is the major task of informing members to the extent they can provide advice on a knowledgeable basis. The parent-teachers association should not be used to ratify predetermined decisions of school officials. Its role is to provide input for the decision making process. The director must give the parent-teachers association his/her personal attention. It is vital for optimum benefit that the director establish direct liaison with the association leadership. The director is in a strategic position to help the organization to understand its real function and achieve success.

RELATIONS WITH SCHOOL OFFICIALS OF FEEDER SCHOOL DISTRICTS

The responsibility to communicate extends beyond the vocational school to the educational community, including school officials of the feeder school districts. The director must maintain a cooperative relationship with key staff members in the feeder schools. The initiative for establishing and maintaining rapport with feeder school personnel is the responsibility of the director.

It is of major importance for the director to conduct regular meetings of the feeder school principals, preferably at the vocational school. The director is responsible for preparing the agenda, taking minutes and arranging for each participant to receive a copy of all follow-up action. It is helpful to use these meetings for important purposes in addition to items of concern regarding the vocational program. The interchange of ideas and discussion of current building administration problems establishes a degree of professional fraternization between the director and the feeder school administrators.

Maintaining good relations with the other schools should include more than the usual public relations activities. The director should visit with each feeder school principal in his/her office. This enables the director to have a better understanding of the resources and problems of each feeder school. The visit provides an opportunity to become better acquainted on a personal basis. The director should encourage sharing transportation to professional meetings and cooperate in projects of mutual concern. The feeder school principal should be encouraged to visit the vocational school on an individual basis. This provides a chance for students from that school to greet him, and gives the principal a more in depth understanding of how the vocational school operates. The key is to promote a lively healthy rapport with each feeder school principal, based on professional respect and cooperation.

RELATIONS WITH COLLEGES AND TECHNICAL INSTITUTES

The development of a positive productive relationship with college and technical institute officials will result in the expansion of learning experiences for vocational school students. The director should pursue an articulation plan between the vocational school and the higher education facility. By maintaining contact through informal procedures, such as regular luncheons, the director and the college administrator can coordinate activities, along with providing institutional assistance for each school.

Some important areas of coordination include: each institution providing advanced standing for each school's students desiring to take course work in the other facility, co-sponsoring conference workshops, jointly preparing proposals for program funding, sharing in common costs such as campus security and quantity purchasing, scheduling the sharing of facilities, and a reciprocal library utilization agreement. For maximum benefit the director has responsibility for developing a written agreement to delineate completely all arrangements. The director, working with the college personnel, should strive for eliminating duplication of services, but insure there is no omission of programming in the services needed by individuals and employers.

RELATIONS WITH COMMUNITY AGENCIES

Vocational schools can operate at an optimum level when there is a close working relationship with appropriate community agencies. These organizations can support and enhance the vocational program. The first function of the director is to become acquainted with the key personnel in the community agencies. Of equal importance is developing their understanding of the purposes, needs and accomplishments of the vocational programs.

Support and cooperation from community agencies occur when the directors provide leadership by personally serving in community civic, service or social organizations, along with encouraging his/her subordinates to participate. The direct contact is invaluable in promoting vocational education. This kind of interaction produces several benefits including: improving the image of the vocational school, informing the agency personnel how it can work cooperatively with the school, and enabling the vocational school to adjust programming to better serve community needs.

Lines of communication must be established and maintained. There should be an exchange of brochures and program information. Meetings of agency personnel and the director will promote better understanding of goals and needs. A calendar printed at the vocational school, listing seminars, meetings and activities of community agencies, along with the vocational school, is an effective way of enhancing coordination. The vocational school is an integral part of the services delivery system of a community. The director plays a key role in determining the effectiveness of the symbiotic relationship developed for the good of the individuals and organizations served by the vocational school and the community agencies.

RELATIONS WITH ADVISORY COMMITTEES

Simply having an advisory committee does not insure that the committee will be viable and effective. The advisory committee will need assistance if it is to be functional. The director has a major role in helping to maintain the smooth and effective operation of the advisory committee. He/She should develop and implement procedures to teach committee members their roles and the role of the committee, along with informing teachers of how to utilize the expertise of the advisory committee and to recognize the potential value of the committee.

A functional advisory committee will provide much of the responsibility for its own leadership, but still the director must monitor the situation to insure the committee continues to operate effectively and has membership representative of the occupation with the ability to successfully advise vocational school personnel. The director should provide written rules of operation to help guide the continued effectiveness of the committee. Finally, it is mandatory that the director provides the advisory committee with positive feedback so the committee can see that it has accomplished something. An added option would be to conduct an annual appreciation function to recognize committee members for their assistance. Many vocational leadership clubs include advisory committee members on the invitation list of the annual awards banquet. Attendance at such an event does a great deal to stimulate the enthusiasm of advisory committee members.

RELATIONS WITH VOCATIONAL EDUCATION YOUTH ORGANIZATIONS

The director has the major responsibility to provide the opportunity for meaningful youth organization activities. Supervisors and teachers are directly involved; however, much of the leadership should eminate from the director. He/She should insure that the organizations are an integral part of the total program of vocational education. The director must inspire his/her associates to provide the direct support and supervision necessary for clubs to function in the appropriate manner.

The director will have opportunities for direct involvement with members of the youth organization. He/She must take advantage of these occasions to actively encourage the students, and reinforce their participation in promoting their own leadership development.

The director has the responsibility to prepare and recommend to the superintendent appropriate regulations for youth organization activities. He/She should develop guidelines for budget preparation in compliance with school district regulations on activity fund accounting. Many directors have developed advisor handbooks to assist teachers and supervisors to clearly understand their roles.

Youth organizations are very helpful in providing positive publicity for the school. The director needs to provide an orderly method of enabling student reporters to forward news stories to

appropriate media. Many directors have expedited this process by appointing one staff member, with ability and skill in public relations, as the coordinator of youth organization publicity. (See section on Relations with Press, Radio and Television.)

An important area of responsibility for the director is evaluation of the youth organizations. A comprehensive evaluation conducted by the director will indicate areas of improvement. The evaluation should be continuous, based upon appropriate standards, and must focus on both procedures and results. The director will need to monitor activities carefully to obtain the information necessary to make informed decisions. The director must stimulate advisors to constantly evaluate and encourage students to gauge their progress in obtaining maximum benefits from organization activities. As advisors and students learn the process and value of careful evaluation, they will more fully realize the impact of the youth organizations as a teaching and learning tool.

RELATIONS WITH PUBLIC OFFICIALS, EMPLOYMENT SERVICE, BUREAU OF VOCATIONAL REHABILITATION, COMPREHENSIVE EMPLOYMENT & TRAINING ACT OFFICIALS, WELFARE AGENCIES AND HEALTH AGENCIES

Although these individuals and organizations provide different services, there are many similarities in working with them. The director must develop a constructive relationship between the school and all appropriate organizations. Today it seems education is everyone's concern, creating an expanded responsibility for school-agency communications and coordination. The director should take the initiative for establishing a positive working relationship. He/She must take advantage of all opportunities to represent the school as the delivery system for vocational education and related services.

The director should be involved in representing the school in community planning and projects that enhance the economic climate of the area serviced by the school. As the representative of the major job training facility in the community, it is important that the director work with representatives of public agencies in providing vocational education efficiently and economically. The director must be willing to serve on committees and to encourage key members of his/her staff to be involved in agency activities. Through this direct contact a good working relationship can be developed and maintained, resulting in the school providing vocational education for community agencies.

When organizing advisory committees for the school, the director should include representatives of the agencies. The involvement of these representatives will promote a closer working relationship. The director should include key agency personnel on all appropriate school publication mailing lists, and provide them with a supply of brochures and bulletins for distribution to their employees and/or clients. The director can help promote good cooperation by making the facilities of the school available to the agencies for public meetings on a co-sponsor basis, thus alleviating the necessity of facility fees. The service to the community and resultant publicity will promote future symbiotic endeavors.

RELATIONS WITH PRESS, RADIO AND TELEVISION

Effective community relations are promoted with mass distribution of information about the school's objectives and programs. Newspaper, radio, and television provide means of communicating with large numbers of people.

Many school districts designate one staff member to coordinate news releases and serve as a contact person with news reporters. The director should develop an understanding of the vocational programs with the school public relations coordinator and determine what procedures should be followed in obtaining mass media coverage of events.

In working with representatives of the mass media, remember that as specialists in their own field they do not react well to educators telling them what to do. They decide what is and what is not news from their point of view. If they do not use your material, do not become exasperated. Instead, find out from them what you are doing that might be of interest to them and how to prepare the material in a manner most useful to them.

At least once annually it is a good idea to meet with the mass media representatives personally. Members of the press, radio, and television media usually appreciate an invitation to lunch in the school dining facilities. Informal meetings of this type provide an opportunity to ask them for suggestions of articles in which they would be interested. Members of the mass media are more apt to cooperate if they know you as something

more than a signature or a telephone voice.

If appropriate, invite mass media representatives to serve as members of advisory committees. The coverage of your events may improve and they can help by advising, based upon their knowledge of the community, its needs and its assets. Mass media people are useful contacts because of their power, and they frequently possess a clear understanding of the community as a result of their job.

Both the school and the mass media have specific community responsibilities. Press, radio and television consider themselves to be educational forces in the community. Community relations are as much an interest of theirs as it is of the schools.

Most of the newsworthy things that happen in the vocational school are occurring inside classrooms and laboratories. The people who know what is happening are teachers and frequently the youth leadership club reporters. They should be asked to let the director know of interesting occurrences which may be of interest to reporters. The director should develop a form for teachers and student reporters to complete when they believe there is a news item for release.

COMMUNICATIONS THROUGH SCHOOL DISTRICT PUBLICATIONS

Effective written communication is characterized by messages that are noticed, understood, accepted, remembered and which promote positive action. School district publications should be personalized when possible. Judicious use of personal nouns and pronouns make messages more meaningful and interesting. Written messages should demonstrate concern for people.

The message is more likely to be accepted and elicit the desired effect if its relationship to group values, interests and objectives is clear. A message beginning with a concept the group accepts is a productive way of helping readers to comprehend the information and/or adopt the procedure.

The director must remember that a message is interpreted differently, dependent upon the attitude of the reader. Any message that conflicts with the reader's viewpoint or threatens him/her will not have the anticipated result. The credibility of a message frequently is dependent upon the level of confidence the readers have in the writer. Consequently, the director, along with other school personnel, must establish the degree of confidence required for the community to believe and endorse messages received from the school.

Publications should be easily understood. People can comprehend best when words are used that they recognize. When communicating with laymen it is especially important to avoid acronyms, technical terms and other nomenclature unique to educators. The goal is to communicate rather than demonstrate elegant rhetoric. Care should be exercised to avoid complex sentences and paragraphs. The purpose of the message is to convey information and ideas, not to demonstrate intellect. Careful proofreading is required to prevent embarrassing errors. The director should review publications originating from departments within the school to insure accuracy and clarity.

Frequently money spent to obtain professional assistance in preparing written communications is a good investment. If funds are not available, it is beneficial to seek the opinions and suggestions of staff members, students or volunteers in designing and writing the publication.

These techniques of publication preparation can be applied to whatever medium is utilized. Examples of successful formats can be obtained from other schools, advisory committee members and state department of education consultants.

SUPERVISORY RELATIONS THROUGH SCHOOL STUDENT PUBLICATIONS

Student newspapers and related publications can provide an effective method of promoting intra-school communications among students, parents and staff members. The problem challenging the director is how to keep articles positive and constructive without compromising the principle of freedom of the press. Censorship by school officials is distasteful and usually is not supported by the courts. The task is to develop a good working relationship with the students publishing the publication. This working relationship should include the appointment of a faculty advisor who is highly capable of working with students in preventing problems. The adroit newspaper advisor has patience and common sense in advising student writers. The director should provide appropriate regulations as guidelines for publishing student publications. These regulations should not be constraints, but provide delineation of acceptable activity. Funds are needed and can be provided through the activity funds of the school. Compliments are helpful when

deserved, and suggestions for improvement are necessary to maintain quality publications. The image of the school is reflected in the publications of the school. It is vitally important that the director exercise personal leadership in guiding students to respond in a positive and informative manner. Frequent regular meetings between the director and student writers will promote understanding and cooperation, along with aiding the director to monitor areas of student concern.

UNDERSTANDING AND USE OF LEGISLATION AND LEGISLATIVE PROCESS

Education, and vocational education in particular, are dependent upon state and federal financial aid for continued operation. Frequently the persons most able to inform legislators, directly or indirectly, of the fiscal needs for successful programming are vocational education leaders. The director, by the nature of his/her position, must be willing to assume a leadership role in promoting legislation supportive of vocational education. The legislative process can be complicated, and any attempt to influence legislators must be informed and timely.

One of the best ways to impact upon pending legislation is to develop rapport with the area legislator(s) before action is solicited. Many techniques may be used successfully, such as inviting the legislator(s) to the school for orientation, offering them the opportunity to address awards banquets, graduations, or convocations, placing them on the school mailing list for brochures, bulletins and newsletters, and involving the legislator(s) in meetings to exchange ideas and/or to state concerns. If vocational leaders throughout the state would develop this rapport, the efforts to influence legislation would be more effective.

The director must remain up-to-date on pending legislation. Professional newsletters and meetings help the director to be aware of important legislation. Membership in appropriate state and national professional organizations is supportive of formal lobbying by these groups, plus they provide timely information on legislation.

The director must have contacts within the community to impact upon legislators, who need reaction from additional citizens. Advisory committees, employers, parents, staff members and students are very willing to send letters if the director will inform them of the need and the appropriate solution. Care must be exercised that form letters are not used. Persons writing their legislators must have sufficient information from the director to compose intelligent letters.

PRINCIPLES OF COMMUNITY RELATIONS

Community relations is the art and science of getting along with other people. It starts with the director as he/she represents the school to the community. Every director has community relations, some are good and some are bad. The key is to follow accepted principles in representing the school to the public. The public's appraisal of school officials greatly influences their opinion of the school system. The general public, being comprised of individuals, is sensitive and can change its attitude quickly. It is much more difficult to maintain a reputation than it is to create one. The director must remember that even the best public relations program cannot solve or prevent school problems. However, a good P.R. program can create a climate in which solutions are easier to identify and apply.

The first principle is to determine what the community knows and thinks about the school. It is important to have feedback from the community. Questionnaires, surveys and/or advisory committees can help provide this information. *Secondly*, since it may not be possible to communicate everything, *public relations priorities should be determined.* Target your P.R. problems and resolve them in order of gravity. *The third principle is to develop a plan.* The degree to which strategy is detailed will vary from situation to situation; however, a plan must be developed. *Next, someone must be responsible to implement the plan.* One person must be identified to coordinate the public relations program. It does not need to be the director, but the director should play a major role in the process which is implemented by the person given the assignment. *Principle number five is to determine who in the community needs what information.* The many sub-populations within a community such as parents, employers, older citizens, etc. each need a program designed for them. Target the sub-populations and disseminate information directly to them. *The next principle is to use all the available resources which are appropriate.* Every community has resources for promoting the school's story. Business newsletters, weekly radio, television and/or newspaper columns, civic club speeches, the chamber of commerce and public relations firms are examples of resources used by schools in many communities. *The seventh principle is to always listen to what the community is saying.* Steps should be taken to monitor what the community members say is wrong and/or right. Encourage residents to make their suggestions and comments known to the school officials. *The last principle is to handle the media with care.* All school officials must remember the members of the press consider themselves to be

the "watchdog" of the community. It is important to keep the press informed. The media must have all the facts. School officials should appreciate members of the news media telephoning the school's designated spokesperson to check rumors. Otherwise, the school would not have the opportunity for input. Regular news releases are helpful, along with other techniques noted in the section *Relations with Press, Radio and Television.*

SUMMARY

Quality educational programs always result in good community relations which stimulate support for education. No effort by the director, regardless of scope, can compensate for the negative results which occur from a poor program with dissatisfied students and parents.

The director has an important role in the community relations and participation activities. He/She can enhance the school's image in the community by leading and assisting the staff to practice good public relations procedures.

There are numerous sources of information to help the director who is determined to organize and/or improve the community relations activity. There are abundant examples available from a number of schools, along with other sources concerning practices which have proven to be effective.

Evaluation of any program prepares the way for its improvement. There would be little value in a study of the effectiveness of community relations if there were no meaningful efforts to improve it. Failure to do a commendable job in this important area usually results from apathy or disinterest, rather than from lack of ability.

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CHAPTER XI

FINANCING EDUCATION, BUDGETING PURCHASING AND BUSINESS MANAGEMENT

C. Dale Baughman

INTRODUCTION

The financial and business dimensions of school operation are often relegated to a position of secondary importance when compared to the purer facets of the educational program; namely, curriculum and instruction. In reality, however, the educational and financial aspects of school operation are inextricably interrelated. In an era of increasing public concern as to the tax dollars being spent for education it is abundantly clear that there is a positive correlation between the economic efficiency and educational effectiveness of our schools.

The topics addressed in this chapter have been approached from a "middle ground." The specifics of each component will depend upon the type of school district and upon the administrative organization within the district.

SOURCES OF FUNDING

Local

The lion's share of local financial support comes from real property and tangible personal property. Real property includes land and structures which are perceived to be permanent. This broad category would include all types of housing as well as industrial, commercial, and public utility properties. The second broad category is tangible personal property. This includes such items as machinery, equipment, and inventories of the various business, public utility, or industrial enterprises.

State

For most of public education in Ohio, the Foundation Program is the basis for support. As the name implies, this program's intent was to provide a basic or foundation level of support for education. It has been modified over the past several years (most recently by what is referred to as the equal yield formula) in an attempt to make it more applicable to wide range of educational situations. However, the increased emphasis upon categorical aid and guarantees has resulted in a smaller portion of the state dollars being available for basic educational support.

I have chosen not to go into too much detail concerning the specifics due to the fact that the equal yield formula will likely be changed by legislative and/or judicial action. This perception is based on the ruling by Judge Riley (in the Cincinnati case) that the current method of state funding does not provide for the "thorough and efficient" education as mandated in the Constitution.

The new Foundation Program was passed in 1975 after considerable study by the Ohio Legislature. This formula was designed to increase state funding for public schools while at the same time compensating for differences in taxable wealth at the local level. The equal yield formula assures that each Ohio school district should receive the same amount of money per pupil (combining local and state) for each mill levied up to a maximum of 30 mills. This formula is now fully funded so a given district will receive $48 per pupil per mill for the first 20 mills and $42 per pupil per mill for the next ten mills for a maximum total of $1,380 per pupil ($48 × 20 mills + $42 × 10 mills).

If a district does not levy at least 20 mills, it does not qualify for state aid. Further, no additional state aid is received from districts which levy in excess of 30 mills.

As implied above, this brief treatment of the state role in school finance will not allow for a total explanation of all the guarantees, variables, municipal overburdens, etc. Listed below, however, is a brief summary of how vocational education units are funded.

1. The basic salary allowance—the minimum amount of B.S.,step 1 is $8900 with the maximum being $12,620.
2. Fifteen percent is added to this amount to cover retirement and sick leave.
3. The operating allowance (also called the override) amounts to $4000.
4. Extended service is allowed for those individuals who qualify.

Travel is also included as income from state sources provided that the amount has received prior approval on the VE-21 and that it represents legitimate program business indigenous to the operation of that vocational unit.

Superintendents (JVS), directors, supervisors, coordinators and vocational counselors also receive nominal allowances (according to priority rating).

In addition to the above categories state funds are available for initial construction and equipment as well as supplemental equipment within the constraints of state funds available for such purposes.

Federal

Except for Appalachian regions and special grant or pilot projects most Federal funds are administered through the State Department of Education in accordance with the State Plan for Vocational Education. Initially large numbers of Federal dollars went for vocational construction and equipment but in recent years the state legislature has, for the most part, picked up that responsibility.

CETA

CETA officials, vocational educators, and the public at-large are actively interested in obtaining a better return on their investment from dollars handled under the auspices of the Comprehensive Employment Training Act. This general awareness and concern has prompted (and should continue to prompt) vocational educators to aggressively seek positive working relationships with CETA. The five areas listed below are included to help vocational educators take advantage of the potential training benefits of CETA and at the same time avoid the fiscal and programmatic pitfalls which have at times confronted local education agencies.

1. Program Determination - The director must understand the various CETA titles so as to be able to match the appropriate title(s) with local program and employment needs.
2. Pre-Planning - The director must be involved in (if not responsible for) costing out the total program to be sure it will be financially self-sustaining.
3. Official Approval - It is of utmost importance that financial commitments be obtained (in writing) from the appropriate CETA official(s) prior to awarding employment contracts.
4. Cash Flow - The director should be given responsibility for monitoring day-to-day cash flow so as to be sure that the dollars are received and encumbered before the disbursement of such funds is required.
5. Evaluation - As with all aspects of vocational education, evaluation is a very important component of the CETA program. Not only does it cause us to take a broad look at the educational and employment benefits obtained but it helps to justify to our legislative representatives and the public at-large that indeed vocational education is a sound delivery system for translating Federal dollars into actual employment.

Grant Programs

Federally funded vocational education programs have completed their first year of operation after undergoing a major consolidation and restructuring consistent with the Educational Amendments of 1976. The states serve as the focal point for vocational education programs, administering approximately 98 percent of all funds appropriated for this purpose. As a consequence the Office of Education's share of the appropriations for discretionary purposes has been severely reduced. The basic grant program, along with the program improvement and support services program referred to below, form the foundation of the state vocational grant making authority. Both are allocated to the states under a single appropriation authority. The distribution formula is based upon various population criteria and an allotment ratio determined by relative per capita income. Eighty percent of the appropriation supports the basic grant while the other 20 percent supports the program improvement and support services.

The program improvement and support services program will fund the PRIDE research, pilot projects, training, curriculum development, anti-sex discrimination efforts and exemplary and innovative projects. The funds reservations and the Federal share requirements under the basic grant apply to the improvement and support program as well. In addition, 20 percent of the improvement and support grants in each state must be used for guidance and counseling programs.

The special program for the disadvantaged and the consumer and homemaking education program have retained their categorical identities. The disadvantaged program targets assistance to the economically and academically disadvantaged, as well as to those persons who require support services. The consumer homemaking program continues to focus its aid on consumer decisions and household management. Each of these two categorical programs is administered by the states and funded by formula grants based upon the same population and allotment ratio as the basic grant.

The Commissioner's discretionary programs, i.e. programs of national significance have been cut substantially which means that there will probably be few discretionary vocational education dollars available from Washington for fiscal year 1980 grants.

Specifically, the Commissioner's discretionary programs include program improvement with the stated objective of supporting projects of national significance for the improvement of vocational education and training and development program to provide opportunities for experienced vocational educators to spend full time in advanced study and to allow certified teachers in other fields or persons in industry to become vocational educators.

The bilingual vocational training program has

maintained its categorical identity as a national discretionary grant as well as its minimum funding level.

Other grant areas which have comparatively small funding levels are alcohol abuse, youth prevention demonstrations, drug abuse prevention education projects, etc. It should be pointed out that as of this time it is not certain that these special grant programs will be funded for fiscal year 1980 and thereafter.

Vocational education continues to receive support in Congress to the extent that the new emphasis on training in the CETA programs probably will offer school districts a valid opportunity to operate more of these manpower-type programs. The state vocational education programs, however, must become the primary focus of attention in light of the current funding picture.

As with CETA, grant programs have received a considerable amount of bad press in terms of benefits obtained from the taxpayer's money invested. However, such criticism can be held to a minimum and real program improvement obtained if the grant idea is approached from a programmatic perspective. In other words, we shouldn't apply for funds just because they are there, but rather to meet a currently unmet need at the local level. In summary, three points should be made:

1. Be sure to meet all deadlines
2. Include all costs in the budget section of the application
3. "Don't overdo it." Grant programs should not be viewed as a way to obtain easy money, a large portion of which can be siphoned off to cover general operating expenses.

Other

The sources of potential income are probably as varied as the number of districts involved. Examples are student tuition, student lab fees, adult education fees, gifts from citizens, contracted services performed for constituents of the district, interest income, and rental income received from land owned by the board of education.

DIRECTOR'S ROLE IN THE BUDGETING PROCESS

Three definitions are appropriate before entering into a discussion in this area.

Budget - The budget is in effect an advanced planning document which must be developed, approved by the board, and forwarded to the county auditor by July 20 preceding the calendar year for which it is applicable. The budget provides the basis for the temporary or permanent appropriation which will be developed approximately six months later.

Temporary Appropriations - Although a temporary appropriation is not required (one can go directly to a permanent appropriation), such document is usually developed for two reasons: (1) When the fiscal year starts, on January 1 of a given year, no bills can be paid until an appropriation measure is adopted; (2) It is often difficult to get clear and definitive figures from the county auditor as to just what local tax resources will be available for the calendar year. As such, the temporary appropriation, which can last no longer than three months, is often developed and adopted to carry the district through March 31.

Permanent Appropriations - The permanent appropriation, which must be approved and filed by April 1, serves as the general financial accounting guide from the time of its adoption through December 31. Vocational leaders are advised that H.B. 44 proposes to change the fiscal year from January 1 through December 31 to July 1 through June 30.

Preparation of the Budget and Appropriation Measures

Just as buildings are constructed and equipment is purchased to accommodate the curriculum in the physical sense, the budget and appropriations should be developed as the fiscal basis of the curriculum. In other words all financial aspects of the school should be indigenous to the programmatic needs as reflected in the curriculum. As such, input for the budget and appropriations should begin with the vocational teacher. The vocational teacher, prior to making recommendations to the supervisor, should involve the craft committee. The supervisor, upon receiving such recommendations, must be able to provide an objective interpretation of such recommendations (requests) and to apply an educational value to the same. The director, as the instructional leader, must be as intimately involved in the development of the district financial documents as in planning the physical and curricular aspects of the program.

Planning Revenues

In this day of changing state funding formulas, reduction factoring and general uncertainty surrounding the availability of financial resources, definitive planning is most difficult. However, two major sources which should help in this respect are experience from past years and estimates from county auditors.

One source of revenue, hopefully a major one, would be the balance carried forward from the preceding year. It is generally wise to be somewhat conservative in estimating income because if in the official budget (and more specifically in the permanent appropriations) the income is estimated too high the district could very well find itself behind the fiscal eight ball prior to the end of the year.

Administration of the Budget (Appropriation)

There is a wide variation relative to the administration of the district appropriation. However, the one that is best for a given district is the one which most closely aligns with the district's philosophy of finance management and the capabilities of that district's staff.

This author believes in decentralization to the extent that there is that almost magic combination of central accountability and decentralized flexibility. Using this approach the director should be involved in developing that balance.

All directors should be aware of the fact that the treasurer of the board of education is by statute the chief fiscal officer of the district and thus in charge of accurately accounting for all district funds. In most districts, however, the board perceives the superintendent as ultimately responsible for all aspects of district operation, including finance management. This fact of life, in terms of ultimate responsibility, requires that the superintendent have the latitude to decide how much authority will be granted relative to the fiscal operations of the district. However, research and experience show that the following positive values are direct spin-offs of the decentralization of fiscal operations.

1. The director and supervisor perceive their role as that of team member in the area of finance management.
2. Enhances the director's status as viewed by the director's subordinates.
3. If handled properly, it is a legitimate and productive inservice experience for the director and supervisor.

Coping with Austerity Budgets

It has often been said that a superintendent will be popular as long as he doesn't have to say "no." Reality, however, says that sometimes it is necessary to enact guidelines which will result in spending cuts. Legislation which has been recently passed (the School Management Bill) as well as H.B. 44, which is currently being considered, point out very emphatically that the state legislature expects school districts to remain solvent and to stay open.

Although many educators argue for operating on a first-class basis until forced to close, this option is not a viable one. Although there is a temptation to pass the austerity buck to the superintendent, the director's role as a leader will be enhanced if he makes an honest effort, not only to understand the austerity budget, but also attempts to relate the realities of this situation to subordinate staff members.

When working with an austerity budget, it is important that the director institute or recommend cuts which will have the smallest (and most temporary) effect on the educational program. Since every district and every building is different, it is not practicable to offer a common formula which will have state-wide application. However, the resourceful and imaginative leader will be able to objectively look at the program and make such judgments.

Experience has shown that, in times of austerity, instructors are inclined to apply pressure to have an inordinate percentage of limited funds go to salaries. This often becomes the case of "robbing Peter to pay Paul" or critically cutting supply, equipment, etc. accounts in the interest of a more substantial salary increase.

In all cases the austerity budget should be viewed as a temporary situation, i.e. every effort should be made to obtain additional revenues so as to prevent the district from falling into a long term "just getting by" syndrome. Sometimes a district's constituents or even board of education during austerity will, in effect, say "Hey, we're still operating our school and look at the money we're saving." This lack of educational objectivity often encourages citizens to think that all is well in the school as long as they see buses running and smoke coming from the chimney.

DIRECTOR'S ROLE IN ACCOUNTING

This responsibility will be hand in glove with the director's role in the budget process. The reason for the inextricable relationship of the two areas is that proper accounting is a pre-requisite to objective information for the budget and appropriation documents.

Administration of Purchasing Procedures

Staff members sometimes express concern relative to the time and work required in relation to purchasing procedures. An appropriate response to this concern is that not only are there legal mandates for an accurate record as related to the purchase of equipment, supplies, services, etc., but the public at-large is demanding a new measure of general accountability from all public agencies. All staff members should be given the opportunity for input in the initial development and modification of purchasing procedures. A dual benefit is obtained from this process.

First, the staff will be reinforced by the fact that their opinion does count and secondly, having been involved in developing the procedures they should have more of a commitment to see that they are followed from the initial requisition, to the inventory and ultimate use of the item in the educational program.

Every reasonable effort should be made to assure the fiscal separation of goods or services purchased for patronage (customer service) from those acquired for the educational program. More specifically the director should see to it that all

items purchased for patronage actually show up on an authorized work order. Such an approach will assist in obtaining a clearer picture of the financial aspects of both operations and at the same time reduce the likelihood of questionable business procedures as related to patronage.

Administration of Receiving and Disbursement Procedures

It is the purchaser's responsibility to communicate with the vendor any special instructions relative to the delivery of goods or services. Examples are the building or area to which the delivery is to be made, days of the week and times of day which deliveries can be accepted, and the name (if appropriate) of a specific person to whom delivery should be made. Also, if extra invoice copies are needed to qualify for matching equipment funds, this should be clearly stated on the purchase order.

Actual receiving may take place at a central shipping-receiving area or at any number of locations throghout the facility. The important thing is that someone with authority, and at least a basic understanding of the goods being received, be available to sign for the same. Once the item or service has been delivered in acceptable fashion approval for payment should be sent to the treasurer's office without delay. This not only helps a school district to maintain its reputation as a sound business operation but also to realize discounts for prompt payment.

Administration of Student Activity Funds

Youth activities are an integral part of a vocational education program. Indigenous to such student activities will be projects, programs, and other events which will require the receipt and disbursement of activity funds. Although school districts are required to assign an individual as clerk/custodian (often someone from the treasurer's office) to handle activity accounting, the director must also stay on top of the situation.

Such a posture is necessary to ensure each club is conducting activities which are consistent with (1) the established purpose of the group; (2) the stated source(s) and amount of revenue(s); and (3) the established reasons for which its funds will be spent.

Strict adherence to the guidelines in Circular 1550 from the state auditor's office will not only satisfy the mandates of law but it will also require students to plan ahead and to conduct activities consistent with such plans.

SCHOOL SUPPLY MANAGEMENT

As soon as possible after a supply or equipment is received, it should be forwarded to the appropriate area for inventory. For most equipment items this would be to a specific classroom or laboratory area. If it is a supply item it may go to either central supply storage or to a decentralized storage area. The centralized storage area offers the advantage of better and more economical control of the inventoried items. However, the decentralized approach provides an added measure of utility and accessibility, especially if the district has more than one building or campus.

If the decentralized approach is used the director will need to provide leadership to be sure that certain buildings or departments do not overstock. Two major economic drawbacks result from this practice. First, an inordinate amount of dollars is tied up in seldom used inventories and secondly, certain items deteriorate in quality and utility (shelf-life factor) if they are stored for a long period of time.

DIRECTOR'S ROLE IN AUDITING AND PREPARING FINANCIAL REPORTS

To a large measure the director's role in these areas will be determined by the superintendent and business office personnel (including the treasurer) of the district. The word auditing implies the process of examining by a qualified person or persons, a function which has two aspects as related to the director's job.

The director is continually involved in auditing activities by providing cursory supervision of the financial activities on a day-to-day basis. During the annual evaluation of each vocational program (course), the director, supervisor, and instructor should give special attention to audit guidelines. This involves the audit trail of all purchases whether used for the educational program or the patronage aspect of the school operation. The director must be assured that established guidelines are followed in this regard, as a means of saving dollars and to guard against the possibility of the erosion of public trust that results from the mishandling of public funds.

If the daily procedures are adhered to, the monthly financial report which is prepared for the central staff and board of education will be more accurate and consequently more meaningful. Again, if a good job is done in terms of maintaining financial records on a daily basis it not only helps in program evaluation but also makes the preparation of state and Federal reports much easier.

DIRECTOR'S ROLE IN LEGISLATION AND LEGISLATIVE PROCESSES

Many contend that the director, as an educational leader, should not have to become involved in the mundane task of influencing legislation. However, since vocational education has not yet arrived in Utopia, we will take the pragmatic approach for a brief discussion of this topic.

Cultivating Positive Contacts with Legislators

When talking with legislators relative to financial or other types of legislative concerns, it is best to talk from a position of confidence and authority. If your legislator has visited your school and is convinced that you have a viable educational program and a solid grasp as to the realities of operating a comprehensive educational program, you will be in a good position to effect legislative change. If on the other hand he or she is unaware or only vaguely familiar with what vocational education is accomplishing in your area, any input you offer will tend to fall on uninformed and thus unsympathetic ears.

Sources of Information

It is of utmost importance that any data used in conjunction with effecting legislative change be clear, concise, and factual. Nothing turns legislators off more quickly than finding out that the information they have been given is incorrect. The State Division of Vocational Education and the Ohio Vocational Association are both excellent sources in obtaining this information whether of a financial or programmatic nature.

Who and When

Experience has shown that it is very important to get to the right person at the right time in order to realize the maximum return on the time and money invested in legislative activities. Once the individual director has developed the necessary rapport with his district representative or senator he will have a ready source of information concerning whom to see and when to make the contact.

Usually the vocational educator will be advised to state his case to the power structure in the House and/or Senate. Often this would involve, in order, the President Pro-Tem of the Senate or Speaker of the House, the chairpersons of both the House and Senate Education Committees, and finally the chairpersons of the Finance Committees. Again open lines of communication must be maintained with the State Department of Education, the Division of Vocational Education, and other legislative committees such as the JVS superintendents, vocational directors, and vocational supervisors.

Expressions of Appreciation

The vocational director should remain mindful of the fact that legislators are for the most part very busy people and that there is no end to the number of meetings they could attend, committees to whom they could listen, etc. As such, be sure to remember to thank them for their time, interest, and attention. This should be included on each item of correspondence but is even more important as a follow-up to actual meetings with legislators.

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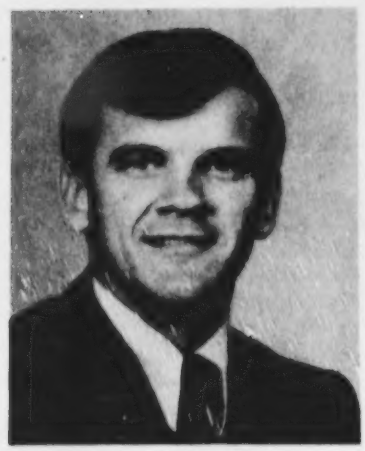

Dr. C. Dale Baughman

C. Dale Baughman graduated in 1957 from DeGraff High School in Logan County, Ohio, and from The Ohio State University in 1961 with majors in vocational agriculture and science. After teaching vo-ag and science at Graham High School for three years, he received a masters in educational administration at Wittenberg University, 1964. After serving for two years as assistant high school principal at Graham, he was employed as vocational supervisor by the Montgomery County Board of Education and later appointed administrative assistant to the County Superintendent.

He was employed as director by the MCJVSD Board in 1968, received his Ph.D. from Miami of Ohio in 1972, and was appointed JVS superintendent in 1976.

In addition to teaching graduate level courses he has served as President of the OCLA, as a member of the BASA PR & R committee, the OVA and FHA/HERO Boards of Directors and as speaker at the AASA national convention.

CHAPTER XII

LEADERSHIP RESPONSIBILITIES WITH SPECIAL SERVICES

Rosemary F. Kolde

INTRODUCTION

Vocational directors are not unlike corporate directors. They share a common purpose—to provide the leadership and management techniques that will ensure the successful operation of their institution.

Effective leaders establish a plan and goals as to operation, control, evaluation and continual development for their areas of responsibility. They have the ability to establish the goals that will lead to the attainment of the plan.

Good leadership is displayed through the sharing of responsibilities. Delegation of these responsibilities allows others to contribute to the attainment of the established goals, and a share in the success. It is the simple technique of the use of "we" instead of "I".

The ability to develop a positive working relationship with others is also indicative of a leader. A positive working relationship is created through mutual understanding and respect. The leader is sensitive to the needs of others, is able to identify those needs and is capable of selecting resources to meet those needs.

Communication is the term most often credited as being the foundation of good leadership. Leaders share their ideas with others, either orally or in written form. Communication must go both ways—leaders must not only share their own ideas and concerns, but must be effective listeners also. Only through this form of communication can the director provide the leadership needed for a successful operation.

A director's leadership responsibilities with special services are examined with the above concepts in mind.

ADULT EDUCATION

Vocational education for out-of-school youth and adults plays an essential and vital role in maintaining our nation's high production rate and high standard of living.

Supplementary training in occupational skills and related technical knowledge helps to make adult workers more productive and gives them the added skills and information which they need to advance in their chosen occupation. Technological advance and the increasing need for upgrading and improving job skills has greatly increased the emphasis on adult education. This training and knowledge is provided by adult vocational education programs.

The overall plan for the adult program should be developed by the director. Leadership is needed first to identify new opportunities for adult programs and to take the necessary action to implement them; secondly, to give those persons working with you the opportunity for additional input, development of ideas and a share in the responsibility and success of a viable program. Effective communication with the adult education supervisor is needed to ensure that all areas of responsibility are clarified and assigned.

It is necessary that the director periodically analyze the needs of the community being served, develop ideas for new program offerings to meet the changing needs of the community and society, review the promotional aspects of the program and examine the training programs provided for business and industry. In the leadership role, as director, you must be able to envision needed changes and be able to communicate and share those visions with your co-workers.

Community Needs

The adult education program of your school district should serve the needs of the community. Program offerings which might be considered are:

Adult Basic Education (ABE) - A program which provides individuals a second chance to learn the basic skills of reading, writing and arithmetic. The instruction is geared to adult interests and needs. To enroll in this program, a person must be 16 years of age or older who has not graduated from high school and is not currently enrolled. Student ability may range from individuals who cannot read or write to those preparing for the G.E.D.

General Education Development (GED) - The intent of this program is to enable an individual who did not complete the

requirements for a high school diploma to prepare for completion of a G.E.D. examination. This examination provides the student with a formal opportunity to demonstrate educational achievement and maturity comparable to the regular high school graduation level. Successful achievement on the G.E.D. test serves as a basis for the awarding of a high school equivalency certificate from the Ohio Department of Education. The Statement of High School Equivalence indicates that the individual has the equivalent of a high school education. This certificate provides the holder with additional educational and vocational opportunities as well as a personal sense of satisfaction. Most colleges and universities have incorporated standards into their admission policies for accepting G.E.D. test scores in lieu of complete high school transcripts.

Adult Full-Time Programs - Programs designed to provide training for individuals who have already entered the labor market or who are unemployed but need retraining to prepare for a new occupation. Full-time programs generally meet five (5) days a week for either eighteen (18) or thirty-six (36) weeks. Adult full-time programs require the same type of leadership on the part of the director as the day school programs. The director must make certain that the curriculum adheres to school philosophy, supplies are available and that equipment is in good repair.

Adult Supplementary Programs - Part-time programs to provide skill training for upgrading and improving of job skills. This type of training may be necessary for job stability or for job advancement. Supplementary programs generally meet one (1) or two (2) evenings a week. Additional supplementary programs to meet community needs could be special service programs such as basic law enforcement, emergency medical training and school bus driver training.

Promotional Aspects of Adult Education

Adult education serves the needs of the community, as well as serving the needs of the school. Through the adult education program offerings, the community is made aware of educational opportunities and services available to both youth and adults. Your adult program offerings are one of the best day school enrollment tools at your disposal.

Adult programming also familiarizes business and industry with your product—individuals who have acquired a salable skill. Employees enrolled in supplementary courses for retraining or skill upgrading are often attending these courses through employer persuasion or suggestion. Many employers will assume all program costs to acquire a better skilled and better qualified employee. Through the retraining of current employees, they become aware of the yearly graduates of your day school programs.

Business and Industry Training Programs

Training programs provided to business and industry should not be subjected to unnecessary guidelines or boundaries. A director who is concerned with meeting the needs of the community which the school serves will be committed to providing business and industry with the types of training programs needed. The director will provide the necessary latitude to the adult supervisor to allow for flexibility in planning of these programs. It is the director's responsibility to provide innovative thinking in programs and building scheduling. Consider offering training programs during the 2nd and 3rd shifts as well as on Saturday and Sunday. Consider the possibility of programming two hours prior to or immediately after a change of shift. Plan for whatever can be arranged to meet the needs of the business community. A few training programs to be cognizant of are:

In-School - The training program is provided for in the school facility. The school provides the instructor, facility, equipment and supplies. The employees report to the school for the training as prescribed by the curriculum developed to meet the employer's needs.

In-Plant - The training program is held in the employer's facilities utilizing his equipment. The school provides the training instructor and the curriculum which meets the needs of the program. The vocational school provides the organization and management for the employer as well as the teaching techniques.

Supplementary - These programs may deal with subjects other than skill development. Courses may be offered in supervision, human relations, management (both time and financial) to name a few.

Apprenticeship - Programs organized to train workers, according to a written agreement, in a recognized skill trade requiring two (2) or more years of work experience on the job, through employment supplemented by appropriate related training experience.

Local apprenticeship programs provide for the registration of individual agreements between apprentices and their employers with the state apprenticeship agency. This registration serves as public record that acceptable standards are observed in the training of the apprentice. These standards must be closely observed by the school in providing the apprenticeship programs. Vocational facilities can competently accommodate related educational activities for apprentice training in most trade areas. The director should strongly support cooperation with management and labor organizations to provide the related classroom instruction.

New industries coming into your local area will require training to meet their production level. Plant lay-offs may necessitate providing training so that individuals can upgrade their skills or learn new ones required for other occupations.

The director should be cognizant of the fact that good adult training will earn the respect and acceptance of the vocational program by business and industry and will also enhance the day school operation. The adult education program can have a great effect on the day school placement program.

Determination of the best contacts within business and industry should also be the responsibility of the director. It takes a great deal of time and energy to locate the right person to contact within a given firm. The individual responsible for training within that firm might be the line-supervisor, the training director or the company owner. The ability to get to the right person is directly related to successful cooperation between the vocational school and business and industry. The director must take a leadership role in this endeavor.

The director should utilize to the fullest the advantage of having an adult education program. It is structured to handle a variety of special groups as well as being flexible. The adult education program can help make your school indispensible to the community.

Consideration might be given to additional services offered through the adult education program. Due to the increased emphasis upon CETA and CETA legislation, many new opportunities are available to vocational programming. Skill training programs, assessment and guidance programs, motivational programs and displaced homemaker programs are new and expanding areas.

Assessment and Guidance

Occupational assessment and guidance has been mandated through the new CETA legislation. It has become necessary for all CETA clients to participate in an occupational assessment, counseling and employability planning. This is a **natural** service for the vocational school to provide. The primary purpose of such a program is to aid unemployed or underemployed adults to become successfully employed through training or retraining in an entry level skill.

An assessment and guidance program provides assessment, counseling and development of an employability plan which matches the aptitude and interests of the individual and leads to a vocational training program, on-the-job training, direct employment or further supportive services obtained through various cooperating community agencies such as CETA, OBES, WIN, Mental Health, BVR, etc.

Displaced Homemaker

The displaced homemaker has gained national notoriety during the past year. Upon surveying community needs, the director may find that there are a growing number of homemakers who find themselves forced to seek work because of a broken marriage, because they are widows or because of a loss of family income.

This program guides the individual through the process of self and career exploration. Utilizing assessment materials and self-help modules, they are able to identify work interests and aptitudes. Training in an occupation that matches interests and aptitude can then be provided through your existing adult vocational training programs. After completion of training, the displaced homemaker is assisted in finding employment. It is an excellent program to utilize in conjunction with an assessment and guidance program and already existing adult vocational programs.

A successful school operation is dependent upon the director creating a close working relationship with the individual responsible for the day-to-day operation of the adult education program. There can only be one person in charge of the building; therefore, the adult supervisor is in a supportive role and must take his direction from the leadership of the director. It is imperative that the director provide the leadership and direction to coordinate and maintain a solid liaison between the day school and adult personnel and operations.

The responsibility ultimately lies with the director for the efficient operation of the adult education program as with all other special services. This responsibility includes giving direction and effectively communicating that direction for the proper coordination of all support services to ensure a successful program. Clean facilities, properly maintained equipment, adequate supplies and knowledgeable instructors are but a few of the areas dependent upon your leadership for a flourishing adult program.

Once an adult education program is established, the director must supervise and oversee the program direction . The program must support the philosophy of the total school operation. There must be proper coordination to ensure its success. The director should be aware that problems do arise with the double utilization of equipment and supplies. Adult courses are short and intensified, necessitating that equipment be in constant good repair and that supplies be immediately available. The quality of the instructional staff is as important as it is in the day school operation. It is the director's responsibility to deal with operational problems and to see that they are properly resolved. An adult will view an ineffective or poorly managed program as an example of the total school operation.

As director, you must be prepared to handle disgruntled and unhappy adult participants. You must plan ahead. Prepare strategies and techniques to take care of the problems before they occur. If they are not handled effectively they can affect your total school operation.

A quality adult vocational education program requires wise, informal and vigorous leadership from the vocational director. You must have a thorough knowledge of the foundation and status of vocational education as well as an expanded knowledge of the community being served.

SUMMER SCHOOL

Summer school can be a valuable asset to the student, the director and the community. It is through your guidance as director that summer school can produce beneficial results for all concerned.

Make-up Time

The summer instructional program can be utilized as a make-up time for vocational students needing additional work due to a prolonged absence from the vocational program or to make up work not satisfactorily completed. These courses may be taken for make-up credit or for vocational make-up hours.

Enrichment Courses

It may be desirable to coordinate the summer make-up courses with enrichment courses for non-vocational students. Enrichment courses provide regular high school students with opportunities for mini-courses for vocational enrichment and allow them to earn credits toward graduation.

Academic Courses

By surveying community needs, the director may find that there is a need for particular academic courses such as English or Government. If sufficient interest is developed through your member schools, your summer instructional program provides the perfect delivery vehicle.

Career Exploration

A summer career exploration program might be initiated by the director to stimulate interest in vocational programs among students in grades 7 through 10. The careeer exploration program affords the students an opportunity to explore areas of vocational interest. To enable them to obtain an overview of programs offered at the vocational level, you might consider introducing them to occupational clusters, thus permitting the student to gain a broad perspective of entry level positions in a variety of occupations. Such clusters might include:

1. Automotive and Power Equipment
2. Construction and Building Systems
3. Food Products
4. Business and Office Occupations
5. Plants and Animal Care
6. Sales and Marketing

Students could have the opportunity of exploring all cluster areas of your vocational program. The student gains a personal knowledge of occupational areas and the vocational school gains community awareness as well as possible future enrollment.

LEARNING RESOURCE CENTER

The learning resource center in vocational education encompasses the total curriculum of a school. It provides the solution to both supplemental and alternative practices for vocational skill training and career development. The learning resource center should contain instructional materials to support the school district's curriculum as well as resource materials for research and self-improvement. Both students and staff should be familiar with the facility, materials contained within the facility and proper selection and use of the resources.

The learning center should be supportive of and meet the needs of the vocational and non-vocational programs through the planning and coordination of activities utilizing such resources as references, technical journals, films, filmstrips, slides, transparencies, video tapes and recordings. These materials should enrich, supplement and support the educational program of your school. They should also be provided at all levels of difficulty, with diversified appeal, to meet all student needs.

The learning resource center should be an

integral part of the instructional program. Mini-resource centers located in close proximity to the vocational laboratory can assist students to grow in their ability to find, generate, evaluate and apply information that will help them to function effectively as individuals in their chosen occupational area. The mini-resource center can help students become independent, self-directed learners by providing normal library content in their skill area, plus audio tapes, filmstrips, records, slides, etc. The mini-resource center should be designed for student users.

The resource center should be flexible in providing needed supportive services. Because students learn in many ways, their exploration should involve many different types of instructional materials. For example: a horticulture student can be assigned to the horticulture mini-resource center to complete an individualized project in landscaping. The resource center should contain reference materials, technical journals applicable to horticulture, filmstrips, slides or transparencies dealing with landscapes do's and don'ts, landscape construction, landscape construction accessories and landscape planting and bed preparation. The student could complete the project, individually, utilizing a number of different types of instructional materials. The mini-resource center should be built entirely around the needs of the vocational programs and students it serves.

The learning resource center is a valuable asset to the vocational instructor in terms of supplementary materials to their curriculum. These materials should strengthen, refine and reinforce the curricular activities occurring in the vocational program. Films, filmstrips and video tapes of a task or skill actually being performed gives the necessary added dimension for the reinforcement of the learning process. Supplementary materials found in the learning center are an excellent resource for the preparation of overhead transparencies, charts, diagrams, etc., to visibly expand a point of information. The resource center can be an indispensable area to new instructors, enabling them to assemble a variety of teaching aids and techniques.

The general supervision and coordination of the learning resource center is the responsibility of the director. The learning resource center should directly reflect your school district's philosophy. This can be accomplished only through the director monitoring the selection and use of materials purchased. It is your role to establish goals that will tend to lead to the attainment of that philosophy.

CAFETERIA

The primary function of the cafeteria is to provide a sound, nutritious school lunch program for all students. By serving a nutritious meal, the cafeteria contributes to the students' physical well being, to their mental receptivity and to their knowledge of good food and eating habits.

The total cafeteria operation falls under the director's responsibility and includes supervision of scheduling, menu planning, ordering and purchasing, budgeting, the free lunch program, federal and state reporting and compliance with state Board of Health requirements and regulations. The cafeteria, as a special service, particularly requires excellent communication with, as well as working closely with, the operating people on immediate and long-range plans.

The most important aspect of the director's role in providing good leadership in the coordination and operation of the cafeteria is to provide the direction and goals that will lead to an effective and efficient cafeteria service. The director must effectively communicate to the cafeteria staff the importance of planning ahead and then following through with those plans. A cafeteria cannot operate successfully on a day-to-day basis. Menu planning, scheduling, purchasing, etc., must be done ahead with a definite plan for follow through to ensure attainment of those plans.

The director's leadership role once again requires the utilization of good management techniques. You must initiate the planning of the cafeteria services, coordinate and direct towards the achievement of the initial goals for those services and evaluate the total program.

SAFETY AND FIRST AID

Based on the concept that vocational education is a total education in preparing individuals for gainful employment, safety and first aid must be included. The success of this segment of the curriculum will be dependent upon the director's commitment to the concept and your ability to convey that commitment to members of your staff.

Laboratory safety and first aid procedures should be an integral part of every curricular program. They should be stressed and practiced in every vocational laboratory. Both industrial safety and safety legal requirements should be followed. Safety precautions practiced as part of the learning situation become as much a part of a skill procedure as the skill itself. The utilization of

safety precautions and equipment is one more segment of the total curriculum developed for a vocationally prepared, well trained employee.

The enforcement of the use of safety equipment such as safety glasses, hard hats and hard-toed shoes, where needed, will result in far fewer laboratory accidents. Proper use of equipment and application of machine guards and other safety apparatus may result in saving a student serious injury.

An effective director will encourage both student and staff involvement in safety and first aid procedures. Students should be encouraged to take part in safety inspections, safety programs and possibly the awarding of certificates to vocational programs best meeting the safety criteria set forth. Instructors should be cognizant of their responsibility in enforcing safety regulations within their programs. Violation of safety regulations by instructors should be handled by the director, thus ensuring maximum safety conditions within a laboratory.

First aid procedures, as well as safety procedures and apparatus, may save a life or limb. Both should be required in a vocational program. Consideration might be given to requiring each student, upon completion of their training, to have earned certificates in basic first aid and cardiac pulmonary resuscitation.

Periodic safety inspections throughout the school is another method of reinforcing safety precautions. These inspections may be held by the director, a safety coordinator or a safety inspection team composed of the safety coordinator and students. Inspections held by OSHA or a community environmental control agency are another excellent method of getting the safety message across.

Another aspect of the safety program to consider are tornado and fire drills. The immediate vacancy of a building in case of fire, or the speed with which staff and students move to designated areas of safety during a tornado warning may well save serious injuries or loss of lives. The director should emphasize the importance of monthly fire and tornado drills, coordinate planning and facilitating of evacuation activities and supervise the scheduling of the drills.

Safety and first aid, as well as the other special services, are dependent upon the leadership of the director and the ability the director has developed to share ideas and concerns with others. As director, you must be able to share your commitment with the staff and students, encourage their participation and ensure that their participation leads to the promotion of a significant program of safety and first aid.

STUDENT ACTIVITY PROGRAMS

One dimension of the educational program which provides the director the opportunity to initiate and promote leadership activities is the area of student activity programs. This special service affords the director the opportunity not only to lead but also to interact with the students.

One of the most rewarding experiences for student, instructor and director is youth club activities within the vocational program. Student association with F.F.A., D.E.C.A., H.E.R.O., O.O.E.A. or V.I.C.A. provides the opportunity for leadership development, self-development and social development. The concept of the vocational youth organization is a comprehensive one which includes skill competition as well as educational and service activities.

Educational Activities

The director should be prepared to lend support to vocational club educational activities. Many of these activities can be incorporated in the normal school day.

Class Projects - The class may undertake a project connected with a unit or module currently being studied. Example: a business and office program might assist a businessman in urgent need of unavailable clerical services. This project could conceivably consist of typing stencils, proofreading, checking spelling and punctuation, duplicating, folding, stapling, counting and packaging. All of these steps are an integral part of the curriculum and the project serves as reinforcement of that curriculum.

Field Trips - Field trips should further enhance educational opportunities and learning experiences. They should relate to and enrich the total educational program. The director should encourage occasional trips of this nature but should be confident that they are justifiably and educationally sound. It is also the director's responsibility to set guidelines for such trips as well as rules and regulations concerning student conduct and dress. (Field trip guidelines are futher discussed under *Pupil Transportation.)* You should instill within the staff the concept of their class presenting an image of the school on their visits. It is necessary that the image be a positive one in order that the community's attitude toward the youth and the school be positive also.

Service Activities

Students should be encouraged to take part in service activities within the community. This activity is an important part of the self-

development of an individual. Community clean-ups, making and delivering favors to nursing homes, entertaining children in hospitals or donating time or money to charities are but a few of the available options. The director should also encourage students to perform service activities within the school. They might furnish food and clothing to needy families, donate blood when needed, or hold fund raising projects to raise money for students in need of financial assistance. Many of these activities need the initiative and leadership of the director to get them underway.

Skill Competition

Skill competition within the youth organizations are generally held at the regional, state and national level. The director needs to actively encourage students to prepare and take part in the competitive events. It is an enriching learning experience for the student to perform under pressure during skill competition. The student is also afforded the opportunity of meeting and interacting with vocational students from other schools. To cheer a fellow student on to victory, or to be the victor, is truly a rewarding experience and one that does much to build individual confidence. To console a fellow student, or to be a loser, is another aspect of self-development which is harder to accept, but just as valuable in the development of the total individual.

The importance of vocational youth organizations within the school setting is dependent upon the philosophy held by the director and the school. Vocational youth organizations, to be effective, should be an integral part of the curriculum. The development of leadership, of the individual, and of sociability are primary to the total person vocationally prepared for the "World of Work." The vocational program and the vocational youth club share a common purpose—to develop an adjusted, self-sufficient and responsible citizen.

In a joint vocational school, the vocational youth organization serves the social, recreational and aesthetic needs of the student. They may also participate in other organizations, teams and leadership activities at their home school. The comprehensive vocational student is provided the same opportunities.

One of the major difficulties a director will recognize in the administering of vocational youth organizations is the organization of the youth clubs at the state level. Each youth club operates under a different set of rules and regulations which contributes to a good deal of misunderstanding and consternation among the students. As director, you will have need to clearly communicate these differences to staff and students to avoid conflicting issues before they arise and to generate a general understanding.

Beneficial leadership skills and direction can be established through student activities by the director. A student council, or governing body, is another excellent vehicle to develop leadership qualities in students. The director, through coordination and communication with this group, can contribute to their successful entry into the economic system of our nation.

TRANSPORTATION

The leadership of the director is extremely important in the area of pupil transportation. You must give direction to provide for the safe transportation of your students as well as complying with state rules and regulations. A director's involvement in student transportation will vary greatly from school district to school district, dependent upon the number of school buses involved and the amount of transporting done by member schools. You should be familiar with state operational regulations to ensure staff compliance.

General Operational Regulations

A director may be designated as transportation administrator by the board of education. It is then your responsibility to provide, insofar as possible, safe school buses. This is accomplished by assuring that all school buses meet "Ohio School Bus Minimum Standards" and that all school buses are under a continuing maintenance program. All school bus drivers should be instructed as to time schedules, routes, duties, rules and regulations and school district policies relating to pupil transportation.

Driver Qualification

It is necessary that all school bus drivers meet the legal requirements of the state of Ohio before being permitted to transport students. There are state recommended pre-employment courses which all school bus drivers must successfully complete. You may wish to explore the idea of your Adult Education program providing these courses for local schools in your area.

School bus drivers must:

-be at least 18 years of age.
-be of good moral character.
-be physically qualified and pass an ***annual*** physical examination.
The criteria are outlined in the *Ohio Pupil Transportation Laws and Regulations*, published by the Ohio Department of Education and Highway Safety.

-be properly trained in school bus operation.
-be familiar with laws and regulations pertaining to school bus operation.
-hold a current Ohio Chauffeur's License marked "School Bus Operator."
-hold a current bus driver's certificate issued by the county board of education, or city or exempted village superintendent.
-satisfactorily complete the State Department of Education Basic School Bus Driver Education Program within the 1st year of employment as a school bus driver.
-attend all safety workshops and meetings as required by the school district administration.

Pupil Capacity of School Bus

It is strongly recommended that school bus routes should not be designed without providing a seat for every student. The school bus driver has full authority and may assign seats if necessary.

Field Trips

Field trips are excellent learning experiences and afford an additional means of enhancing educational opportunities. (Field trips, in general, are discussed under *Student Activity Programs.)* Educational field trips are considered non-routine use of a school bus. These types of trips are under regulation also.

-Every field trip using a school bus requires a trip ticket. The school bus driver must return these trip tickets to the transportation administrator upon completion of the trip for record purposes. Total number of miles must be recorded on the ticket before it is turned in.
-The superintendent shall make the final judgment as to the educational nature and benefit of the trip.
-***Only*** participating students may ride the school bus to the scheduled event. This includes chaperones.
-Participating students residing on the most direct route to and from the event may be picked up and dropped off. Special routes cannot be established to distribute students —they must be returned to the school collection point.
-If the field trip requires more than five buses, the district board of education must pass a resolution prior to the trip approving such bus usage.
-Board-owned school buses ***may*** be used for trips out of state, provided the ***entire*** trip does not exceed 120 miles from the sending school.

General Regulations

Buses may not be used to haul cargo, surplus commodities, etc., between schools. When necessary to transport special equipment, each student on the bus must be seated.

While students are on the bus, animals, firearms, ammunition, explosives or other dangerous materials or objects may not be transported. School board policy should include a list of permissible cargo which does not conflict with the regulations. (For example: size limits on class projects.)

Unauthorized passengers cannot be transported by school bus. This refers to non-school children and adults not approved by the school district.

Construction Activities

Off-campus educational construction activities offer a wide range of educational opportunities to augment vocational laboratory activities and educational skill development. In order to provide this type of activity, the director must display initiative as well as flexibility.

Before approving off-campus construction activities, you must be certain that the construction project meets the educational objectives of the vocational program. A regular school bus with a licensed driver may be used for a construction bus. However, to provide more flexibility, a construction bus driven by the instructor may solve many scheduling problems. A construction bus to transport the students between the campus and the work site allows scheduling flexibility. A renovated school bus is the perfect vehicle for this type of activity.

Some general guidelines to follow for the renovation of a school bus are:

-The construction bus should be painted a color other than "school bus" yellow.
-All school bus signs and identification must be removed.
-There must be adequate seating arrangements for each student.
-The bus must be equipped with a secure storage area for tool boxes and small hand tools. (The storage area should contain some means of ensuring that the equipment will remain fixed.)
-The instructor/driver is required to hold a Chauffeur's License.

For more specific guidelines, refer to the Ohio Department of Highway Safety laws and regulations.

SUMMARY

Vocational directors must provide the leadership and management techniques to ensure the successful operation of their school. This chapter has explored some of the director's leadership responsibilities with special services.

Adult education can be viewed as a large umbrella covering community needs, business and industry needs and CETA needs. The programs offered under adult education, particularly those for business and industry, should not be subjected to guidelines or boundaries. The director must provide the initiative and the necessary latitude to the adult supervisor to allow for flexibility in planning for these needs.

Through the ***summer school*** program, the vocational director may initiate course offerings for make-up time for vocational students, enrichment courses for non-vocational students, academic courses for students of member schools or career exploration courses for students grades 7 through 10. Through all of these courses, you are increasing community awareness in vocational programming as well as serving community needs.

The ***learning resource center*** encompasses the total curriculum of the school. It directly reflects your school district's philosophy and it is the director's responsibility to monitor the selection and use of materials in keeping with that philosophy.

Leadership is required in the coordination and operation of the ***cafeteria.*** The director must effectively communicate to the cafeteria staff the importance of planning ahead and following through with those plans for an efficient cafeteria operation.

First aid and safety precautions practiced as part of the vocational learning situation become as much a part of a skill procedure as the skill itself. The success of a good first aid and safety program is dependent upon the director's commitment to the concept and the ability to convey that commitment to the staff and students.

Student activity programs afford the director an opportunity to initiate and promote leadership abilities in young people. The importance and success of youth organizations within the school are dependent upon the director's philosophy of the inclusion of youth organizations as an integral part of the vocational curriculum.

Safe ***transportation*** must be provided students within the guidelines of state transportation rules and regulations. It is the director's responsibility to be knowledgeable concerning these rules and regulations and to effectively communicate the operational regulations to ensure staff compliance within the given guidelines.

Remember, leadership is attained and retained through positive working relationships, communication and delegation. Share the success with those you lead. None of us can do it alone—the strongest foundation is built on "we", rather than on "I".

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Ms. Rosemary F. Kolde

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CHAPTER XIII

COMMUNICATION SKILLS, OFFICE AND TIME MANAGEMENT

James E. Frasier

I. EFFECTIVE COMMUNICATIONS

WRITING

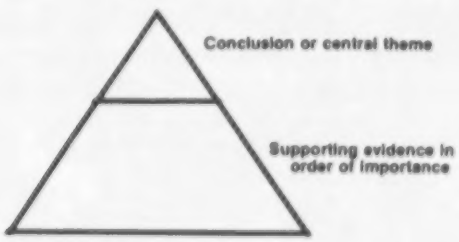
All of us spend a considerable amount of time developing written communications: letters, memos, reports, news releases, pamphlets, booklets, etc. But how much time do we end up losing because of poorly written communications? Let's look at some practical suggestions that can help improve one of the most valuable skills an executive needs—the ability to write.

An article by Joseph Rice in *Supervisory Management*[1] develops a series of "lessons" on effective written communication.

Lesson 1: Writing usually has two purposes—

To communicate
To document

Recommendations, conclusions or answering a boss' questions should always be placed at the beginning of a letter, memo, etc. Don't put something in the way at the beginning that doesn't need to be read. Remember the writer's triangle for organizing your material:



Always start at the top of the triangle and work down. As you work down, information gets broader and reasons can be listed. Itemize these when possible—this makes future reference easier. Include tables or pictures of data.

What to include? Follow these basic rules:

1. Get the facts.
2. Develop your approach
3. Organize your thoughts
4. Write for the recipient—the "you" approach.
5. Use an active, crisp style.

Why put it in writing? Document everything you can for future reference and for future readers since you may not be around when the material needs to be interpreted.

Communicate quickly for the first reader.

Document thoroughly for the down-the-line reader.

Lesson 2:

What direction is the letter going: up, down, laterally or out?

Up: Don't be defensive, overcautious, hide recommendations, evasive. Anytime you can collect data, conduct a survey, or show hard facts, be sure and do it.

Don't say:

- "I feel that we should . . ." (sounds too subjective)
- "It is recommended that . ." (who recommends?)
- "I recommend that . . ." (Did you collect any data?)

Say it like this when possible: "After collecting the data and studying it, I recommend that . . . ."

Down: The biggest error in downward communication lies in being too directive and unclear.

Letters should include:

- examples
- pictures
- providing an oral communication exchange - identify who to ask about details or what office to see, etc.

Laterally:

You have to know the standard ways of doing things. When do you go up before you go across? Or when can you get away with a "blind copy."

Out: Be sure to say what it is you want the reader to do. Follow an ancient letter writing formula: A.I.D.A. - Attention Interest Desire and Action. "Get the reader's attention in the first paragraph . . . . . ." and so on.

Lesson 3:

Follow these hints for greater clarity:

- Don't be redundant, extraneous or irrelevant. Say exactly what you want the reader to do; don't hide the main idea.

- Be careful when you use "jargon" or "alphabet soup." Will the reader really know

what T & I, COE or OWE means?

- Choose simple, precise words when possible. Simpler terms make writing fresher, more direct and more understandable to a wider range of people.

- Larger words are useful to avoid vagueness, to provide variety, to reduce repetition and to highlight subtle difference.

- Stop when you have finished your message.

- Avoid subjective words like good, bad, large, expensive, substantial, etc. These words are not very definitive and leave the true meaning open to your reader's interpretation.

Lesson 4:
Avoid a Caustic Tone:

Examples that can cause you to want to be caustic, cutting, biting, etc.

- Rude parents or students
- Unrealistic state or federal regulations
- Bad weather
- Pressure
- Lack of support
- Shoddy teaching performance
- Errors, etc., etc.

Try to prevent your anger from coming out subconsciously in your writing by trying these techniques:

- Don't put off writing until the last minute
- Let it cool and revise it
- Let a colleague look it over
- Talk about it

Caustic messages have a way of coming back to haunt you—therefore never write them.

Lesson 5: Layout

Help the reader every way you can.

- Set off important information
- Write in short paragraphs
- Use space
- Don't do this: !!

Lesson 6: Learn How to Spell

Final hints and reminders about written communication:

- Nothing you do is worth a dime until you communicate it
- Do it willingly, not reluctantly
- Do it as soon as you can
- Don't put it off
- Revise it
- Show it around

A last thought: "Every time you put something into words for somebody else—it gets just a bit clearer in your own head."

If it isn't in writing, it doesn't exist.

Suggestions for writing papers and reports, memoranda for files, minutes of meetings, etc.

Writing process:

Prepare an outline
Make a rough draft
Prepare the final form

Advantages of outlining:

- You can plan with an economy of effort because you are listing ideas reather than complete information.
- Omissions, gaps, inconsistencies and irrelevancies are more clearly brought out.
- It is easier to revise an outline than written paragraphs.
- The outline can serve as the basis of preliminary discussion with others before time is spent (or wasted) on a final draft.

Prepare a rough draft:

- Triple space copy
- Leave wide margins
- Number and date all pages for future reference.

Suggested format for staff papers and reports:

1. Purpose or problem
2. Brief summary
3. Facts or background
4. Discussion
5. Conclusion
6. Recommendations

Format for meeting minutes:

1. Topics discussed
2. Specific conclusions or decisions
3. What key positions were taken by whom
4. What is to be done by whom and when
5. Underscore important points

SPEAKING

A verbal presentation offers the communicator advantages not found in written media. In a presentation communication is almost instantaneous. Receiver and sender can react at once and exchange ideas. Many variables are at work during a presentation and affect its usefulness. The following key points for successful presentations have been summarized from The American Management Associations Extension Institute program "Communications Skills for Managers."[2]

Purpose:	To describe a new program, to discuss new policies, to illustrate the process of curriculum development, etc.
Effectiveness:	Have a well-defined objective.
Use an Outline:	Outline a clear path to your objective.
Setting the Objective:	What do you want to accomplish and what means will you use. Keep it constantly in mind, don't divert attention by talking about unrelated items.
Consider the Audience:	Vocabulary selection must be a high priority item—do you share a common understanding with your audience. Be aware of differences in meanings and usages with different audiences. What are the needs of your audience? Superintendents, directors and teachers would need different types of information about the problems of drug abuse, for example. What amount of time is available? A presentation is like a box in which you fit what you can. You are limited by time, not what the subject requires. Steer away from complexities. Don't mention terms or processes that will take too long to explain.
The Agenda:	Let the audience know ahead of time what the subject will be so that they can be as informed as possible.
Physical Arrangements:	The speaker needs to know the size of the group, details of the speaker's platform, availability of audio-visual media, seating arrangements, lighting, sound system, etc. Choose a room a little on the small side rather than one that is too large. The larger room will lack the opportunity for closer contact and audience involvement.
Opening the Presentation:	Use the "You"approach. Identify yourself with the group. Show understanding and sympathy with their goals and needs. The audience has to accept you if they are going to hear what you say. How about starting with a joke? Be careful—if you aren't confident of a laugh it's not worth the risk. A bad joke gets things off on the wrong foot and you may never get the audience back. Show your audience that you take their problem seriously. Then explain your solution to their problem.
Maintaining Interest:	After about ten minutes audience alertness drops off rapidly. Therefore it's important to get your main ideas in early in your presentation and then "work like hell" to keep your audience involved in your comments. Keep your listeners involved: Pass out materials, projects, etc. Ask questions—have those attending answer verbally or by a show of hands. Have them repeat words out loud and in unison. Have members of the audience stand for recognition. The more the audience does, the more it will remember. Use visual aids—use them carefully. Charts can show statistics and trends better than words for example. Be certain the facilities have the capacity for the aid selected. Aids should simplify instead of complicate a point. Kinds of visual aids: Transparencies, slides, working models, flip charts, chalkboard, etc., etc.
Conclusion:	What do you want the audience to do or remember? Don't leave the group without reviewing what they should remember or leaving them with a specific request or task.
Rehearsal:	Successful presentations depend on rehearsal. You become familiar with the setting and the physical facilities. Will you need a table for your notes, an extension cord, a hand held microphone? Can the audience see your A—V materials? A rehearsal provides the time for constructive criticism. Have someone review the presentation and look for the following points:

- Dull or boring elements
- Clarity of visuals
- Language and delivery
- Dependence on notes
- Continuity
- Distracting physical gestures
- Do you say "Ummm" or "Ahh" too often

LISTENING

It has been estimated that management level persons average at least 40% of their day in listening to others: supervisors, teachers, students, parents, etc. Yet how much of what we hear do we really comprehend? How often are we distracted by the telephone, other thoughts, gestures, previous experiences with the speaker, etc., etc.

A wide variety of items frequently interfere with our ability to really hear and absorb information that is being directed to us. What are some of these "thought breakers?" As you look at and read the following examples try to recall situations where they may have interfered with your ability to "hear" what you were listenting to.

- Personal Appearance: You're looking at the "wild tie", long hair, short skirt, unbuttoned shirt, etc., etc. instead of "listening."
- Outside noises: typewriter noises, other conversations, loud music etc. may interfere with your ability to concentrate.
- Your Emotions: foul language, anger, inappropriate comments etc. by others may make you lose your cool, disrupting your ability to "hear" and receive the message.
- Stereotyping: when we expect people to behave according to a preconceived label we have put on them, we have established another barrier to good communication and our ability to "listen" to the individual is seriously impaired.
- Talking Too Much: do you give the other person the chance to complete their thoughts or do you constantly interrupt people in mid-sentence?
- Thinking Ahead: how many times do you catch yourself thinking about what ***you*** are going to say next and not listening to what is being spoken?
- Questioning: do you set up the opportunity for others to provide additional facts to you by asking them probing, leading, or open-ended questions such as: "How do you feel about . . . ?"
- Do you ask for feedback: by reviewing facts for accuracy, confirming data or in general by saying something like "Now let me see if I have the facts straight . . ."
- How about eye contact: not looking the speaker in the eye may give a feeling of inattention or insincerity. The same is true if you work on other things while the speaker is talking (e.g. signing letters, filing papers, looking at a report etc.)
- Sitting in Judgment: let the speaker get her problems out on the table without judging or evaluating what is being said.—listen instead, be shock-proof—at least outwardly.

Of course messages are not solely transmitted to us by words. Sometimes people convey a more complete message with their bodies than with their mouths. We must also be able to observe non-verbal communications:[3]

"When you are talking with someone, notice the hand gestures you both make. In a heated discussion you may find that both of you point, punch, and chop with your hands. When the speaker is finished, he will often brush his palms together, lower his head, and divert his eyes. These movements are called terminal markers; they mean that the person has nothing more to say. He is withdrawing from the conversation. Depending on the situation, you can decide whether or not to push for more information.

If you are trying to establish an agreeable atmosphere with a subordinate, look carefully at how he sits or holds his hands. Is he hunching forward in a defensive posture? He may be holding a cigarette as a barrier between you or protecting himself with his fists. As you talk, you should try to get him to relax, to lean back in a more informal manner. See what happens when you put your hands over your head. This is a dominant gesture, a way of saying, 'I have nothing to fear from you' and it will not help you establish an agreeable atmosphere.

In a conference you can learn a lot about feedback by watching for any suspicious looks, frowns, or smiles. Very few businessmen maintain a poker face all the time. If the speaker across the table from you passes his finger under his nostrils, it may mean that he is hedging. He may unconsciously signal strong disapproval by gathering lint from his trousers. By placing his hand over his heart, he may unintentionally reveal his sincerity.

If you're approaching a group involved in a discussion, learn to watch how the individuals stand. People feel a sense of territory. They demonstrate how they might feel about your approach by their body position and the placement of their hands; hands on the hips with elbows out indicate a sort of barrier, an attempt to maintain privacy. The depth of the discussion is often indicated by the distance between those involved; easy tactile range shows stronger involvement."

A final thought on listening from a wise but anonymous businessperson: *"You'll find plenty of profit in letting your ears do a lot of work before your mouth takes over."*

While it would be nice to hold all conversations and discussions in a distraction-free environment, we all realize that this is impossible. Therefore, the next time someone speaks to you or you ask to be spoken to, check out you "L.Q." (Listening Quotient) by recalling the previous examples of communication barriers.

TEN COMMANDMENTS OF GOOD COMMUNICATION[4]

1. Seek to clarify your ideas before communicating.
2. Examine the true purpose of each communication.
3. Consider the total physical and human setting whenever you communicate.
4. Consult with others, where appropriate, in planning communications.
5. Be mindful, while you communicate, of the overtones as well as the basic content of your message.
6. Take the opportunity, when it arises, to convey something of help or value to the receiver.
7. Follow up your communication.
8. Communicate for tomorrow as well as today.
9. Be sure your actions support your communications.
10. Seek not only to be understood but to understand; be a good listener.

TEN COMMANDMENTS FOR GOOD LISTENING[5]

1. ***Stop talking*** - You cannot listen if you are talking.
2. ***Put the talker at ease*** - Help him feel that he is free to talk.
3. ***Show him that you want to listen*** - Look and act interested. Listen to understand.
4. ***Remove distractions*** - Don't doodle, tap or shuffle papers. Close the door.
5. ***Empathize with him*** - Try to put yourself in his place so that you can see his point of view.
6. ***Be patient*** - Allow plenty of time. Do not interrupt him.
7. ***Hold your temper*** - An angry man gets the wrong meaning from words.
8. ***Go easy on argument and criticism*** - Don't argue; even if you win, you lose.
9. ***Ask questions*** - This encourages him and shows you are listening. It helps to develop points further.
10. ***Stop talking*** - This is first and last, because all other commandments depend on it. You can't listen while you are talking.

II. TIME AND OFFICE MANAGEMENT

Evaluating Your Time

Did you ever ask yourself, "Where did the time go?" or "What the hell did I get done today?" Of course you have. We all complain about time: it flies, it doesn't stand still, not enough of it, etc. But is time really the problem? Experts in the field say time is not the problem. The problem lies in ***effectively*** using it.

We need to know how we are presently using our time if we ever expect to manage it. As one expert says, "Work smarter, not harder." Therefore, a personal attempt to improve our time management skills must begin with an analysis of how we presently use our time. Time is not elastic. It's going by the second and either we get something out of it or we don't.

Keep a log of your activities for each day for a week. Record daily activities at fifteen minute intervals. Such a time sheet will give you a more accurate idea of your activities than unaided recall. When you look back over your record you'll undoubtedly find that a high proportion of your time has been frittered away in nonessential "busy work," trivial interruptions, tasks that someone else should do, unnecessary meetings, etc., etc. Once your awareness level of time wasters is heightened you can begin to do something about them.

Begin by changing your personal attitudes and habits. Become time conscious, but not time anxious. Challenge what you're doing by asking yourself these questions:

> Will this help our programs improve?
> Must I do it now?
> Is there anything more important I should be doing?
> Should somebody else be doing this?

Time Wasters/Time Savers

Now we're ready to look at all those little demons that eat up our time. Things that waste time need to be controlled, but how? What are some of the more common time wasters? What can we do to turn time wasters into time savers? A variety of experts have been consulted and the following tidbits are a compilation of ideas and suggestions from these valuable resources. The important part of the whole effort though is how you answer this question: "Are you ready to work at controlling your time and your life—to work smarter, not harder?" If the answer is yes, you'll get

a good start by analyzing the following time wasters/time savers in view of your own work habits. If you're really convinced that you want to be in charge of your time, go to your local library and check out some of the resources listed at the end of this chapter. You'll find a lot of fascinating and enlightening reading contained in these references.

VISITING

1. Disengage your tongue from idle chit-chat.
2. Don't do it at work.
3. Meet visitors outside.
4. Hold stand-up conferences.
5. Modify the open-door policy.
6. Authorize your secretary to handle appointments.
7. Fix reception hours.
8. Have visitors screened.
9. Go to the subordinate's office.
10. Meet the visitor outside your office.
11. Meet with staff members regularly.
12. Don't be a "dropper-inner" yourself.
13. Say "No."

TELEPHONING

1. Screen and group calls.
2. Be brief.
3. Write down topics for discussion before you call.
4. Try a conference call when you need to talk with several people.
5. Have your secretary screen incoming calls.
6. Let your secretary place your calls.
7. Time your calls.
8. When you don't want to be interrupted, be "out," then return the call promptly.
9. Let it be known when you'll likely accept calls.

MEETINGS

1. Can the decision be made without a meeting?
2. Discourage any unnecessary meetings.
3. Use agendas and stick to them. Prepare concise minutes as soon as possible.
4. Start and end on time.
5. Are the alternatives to a meeting more appropriate? (e.g. - making the decision yourself, a telephone call, cancelling, sending a representative)
6. Attend only for the time needed to make your contribution.
7. Keep the participants to a minimum.
8. Choose an appropriate time and place.
9. Have the purpose of the meeting clearly in mind.
10. Hold a stand-up meeting if appropriate.
11. Control interruptions.
12. Accomplish your purpose.
13. Inventory all committees periodically to assess the need for their continuation.

DELEGATING

To see what portions of your work might be handled by someone else, ask yourself the following questions:

- Is there anything someone else can do better than you?
- Is there anything someone else can do instead of you?
- Is there anything someone can do at less expense than you?
- Can someone else do it with better timing?
- Should this be done by someone else for training and development purposes?

Why do we sometimes fail to delegate? Look at the following checkpoints:

- Fear of being found out.
- Overdeveloped sense of perfection.
- Lack of confidence in others.
- A reluctance to admit that someone else knows more.
- Fear of not getting credit.
- Fear of subordinates moving ahead too fast.

Delegating Do's

- Allow mistakes.
- Delegate fully.
- Give credit.
- Balance the workload.
- Communicate instructions clearly and completely.
- Specify the conditions for checkback and feedback.

Answer the following questions to discover your ranking as a delegator:

1. Do you take work home regularly?
2. Do you work longer hours than your subordinates?
3. Do you spend time doing for others what they could be doing for themselves?
4. When you return to the office from an absence, is the in-basket too full?
5. Are you still handling activities and problems you had before your last promotion?
6. Are you often interrupted with questions about on-going projects?
7. Do you spend time on routine details that others could handle?
8. Do you like to keep a finger in every pie?
9. Do you rush to meet deadlines?
10. Are you unable to keep on top of priorities?

RATING	SCORE
Excellent	0 - 1 Yes Answers
Needs Improvement	2 - 4 Yes Answers
Poor	5 or more Yes Answers

Do you delegate as much as you should?

There's no easy way to determine how much of his work a supervisor should delegate to his subordinates. The amount will vary with the job and the capabilities of subordinates. But you can get a rough idea of whether you are delegating enough, and properly, by asking yourself the following questions:

1. Do you have to take work home almost every night?
2. Do you often have unfinished work piling up?
3. Do you have several long-range projects postponed until you "get time?"
4. Do you feel it's a sign of weakness to need subordinates' assistance to keep up with your work?
5. Do you believe that to really earn his salary a manager has to be overworked?
6. Do subordinates often interrupt you for help and advice?
7. Do most of them feel they should bring problems to you rather than make decisions themselves?
8. Do you spend part of your working day doing things for others they could do themselves?
9. Is as much of your time spent on details as on planning and supervising?
10. Do you reserve those details for yourself that you particularly enjoy, even though someone else could do them?
11. Do you feel you must keep a close tab on details to have a job done right?
12. Do you lack confidence in subordinates (i.e., are you afraid to risk giving them more responsibility)?
13. Are you a perfectionist about details that do not affect the final outcome of a project?
14. In delegating a project, do you grow apprehensive and hover over the subordinate who's doing the job?
15. Are your employees unprepared to take on more reponsibilities—either because of lack of training or self-confidence?

"Yes" answers indicate the need for more delegating.

PAPER SHUFFLING

1. Take action on a piece of paper the first time you handle it; file it, throw it away, send it on, answer it, etc.
2. Don't ask for or prepare unnecessary documentation.
3. Throw out junk mail.
4. Resolve a question right away—don't wait.
5. Have your secretary screen the material before it reaches you and sort it into "Action," "Information" and "Deferred" piles.

THINKING

1. Use a location different from your office where interruptions are likely to be minimal.
2. Take breaks at appropriate times so you can refresh yourself.
3. Get to work early, when "thinking" time is less likely to be interrupted.
4. Seal off a block of time when you are not to be interrupted.
5. Engage in physical activity.
6. Sometimes it pays to work overtime—when you won't be bothered.

READING

1. Read selectively—bypass the irrelevant.
2. Learn speed reading.
3. Delegate it.
4. Next to the dog, the wastebasket is man's best friend.
5. Determine if it has to be read now.
6. Is it pertinent?
7. Read for a purpose.
8. Read a book like a newspaper—look for items of interest.
9. Keep a file of items for future reference.
10. Use travel or "waiting" time for reading.
11. Use lunchtime to read.
12. Mark important items for later detailed reference.

PROCRASTINATING

1. Face up to tasks which are distasteful and have to be done.
2. Don't make excuses for waiting such as "Maybe I'd better sleep on that." What would happen if your deadline was moved up 23 hours?
3. Work ahead of schedule so you won't be panicked at the last minute.
4. Is it really necessary to refer the problem to a committee? Maybe this only delays things.
5. Don't evade making forthright statements when they are needed.
6. Making plans is only part of the solution. If you don't follow up on a plan of action things aren't going to be any better.
7. Have fatigue or other physical factors increasingly been causing me to put off action?
8. Avoid the following "escapes" when you are running away from doing a top priority item:

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- Indulging yourself: taking a long lunch hour, playing golf, going home early, etc.
- Socializing
- Reading
- Doing it yourself
- Overdoing it
- Running away
- Daydreaming

9. Set deadlines for completing projects, then work ahead.
10. Eliminate your "pending" files or lists.

DAILY PLANNING

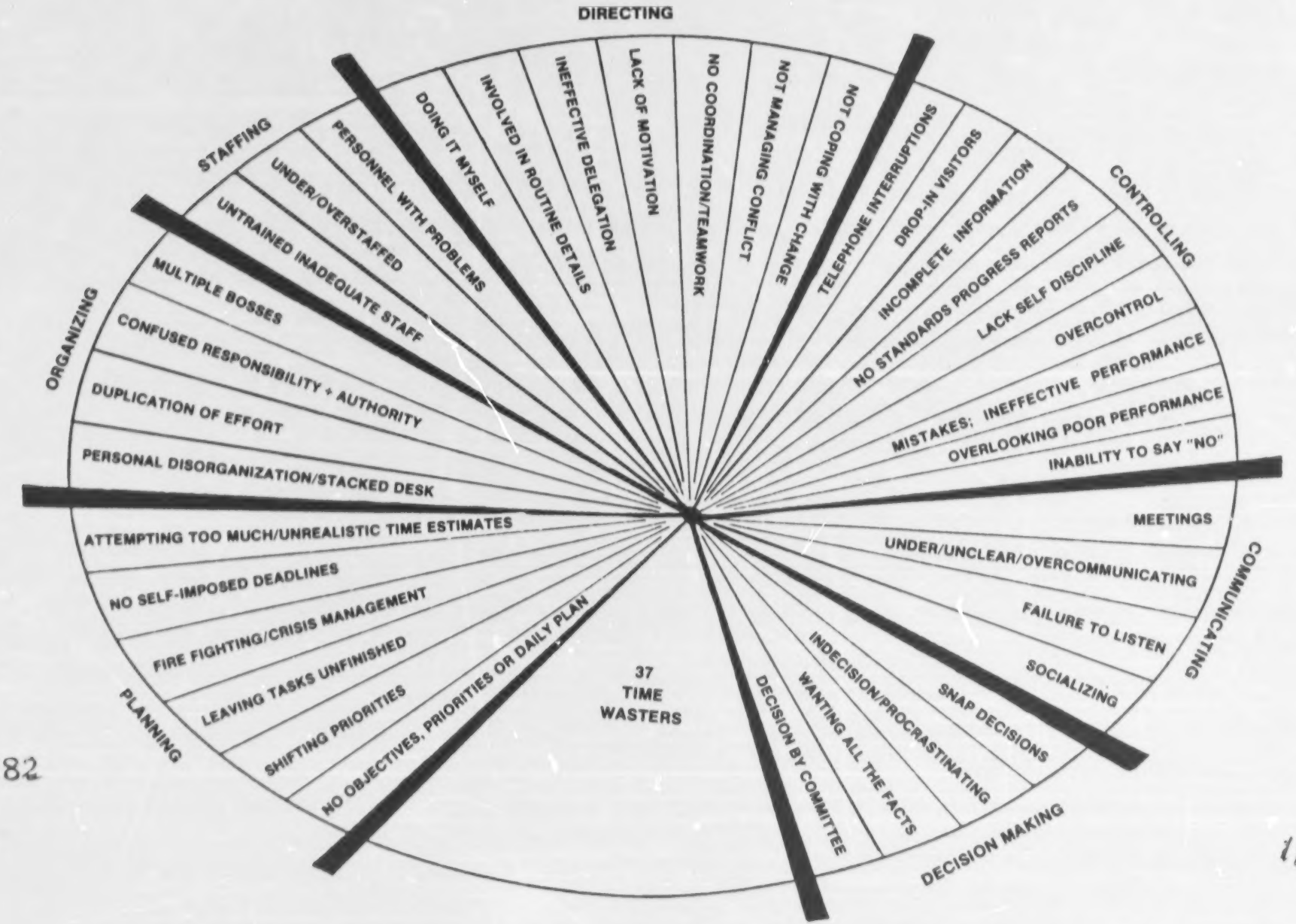
1. Write down what needs to be done on your "To Do" list. Prioritize in order of importance.
2. Get to work ahead of time so you have a chance to get organized for the day's work.
3. Determine the best use of your time at the moment.
4. Don't work on low priority items until the "biggies" are completed.
5. Eliminate low-priority tasks.
6. Set aside time to make your daily plan—either early or late in the day.
7. Block out time to work on your most important projects.
8. Leave some slack time for unexpected activities and delays.
9. Focus effort on top-value items.
10. Do first things first—work smarter, not harder.

CORRESPONDING

1. Write informal notes right on a piece of incoming mail.
2. Use a dictating machine to record responses and directions.
3. Try to reduce drafts.
4. Check your drive for perfectionism before having a letter retyped.
5. Make a simple outline before you write.
6. Get to the point quickly.
7. Use form letter for routine matters.

MISCELLANY

1. Listen actively in every discussion.
2. Delegate!
3. Use specialists to help with special problems.
4. Generate as little paperwork as possible.
5. Keep your desk cleared for action, with the most important item in the middle.
6. Keep everything in its place.
7. Relax frequently—use your weekends for this purpose.
8. Don't fret about wasting time—it's inevitable.
9. Jot down sudden thoughts for reference later. Don't stop what you're doing and change directions.
10. Work at odd little bits of time.
11. Keep productively busy.
12. When your mind stops functioning on a particular item, it's time for a change of pace.
13. Don't do anything that someone else can do better.
14. Keep at a task until it's complete—finish it in one session.
15. Be less available. Fix regular reporting dates and times where appropriate.
16. Attempt less— delegate more.


DIRECTING
DOING IT MYSELF
INVOLVED IN ROUTINE DETAILS
INEFFECTIVE DELEGATION
LACK OF MOTIVATION
NO COORDINATION/TEAMWORK
NOT MANAGING CONFLICT
NOT COPING WITH CHANGE
CONTROLLING
TELEPHONE INTERRUPTIONS
DROP-IN VISITORS
INCOMPLETE INFORMATION
NO STANDARDS PROGRESS REPORTS
LACK SELF DISCIPLINE
OVERCONTROL
MISTAKES; INEFFECTIVE PERFORMANCE
OVERLOOKING POOR PERFORMANCE
INABILITY TO SAY "NO"
COMMUNICATING
MEETINGS
UNDER/UNCLEAR/OVERCOMMUNICATING
FAILURE TO LISTEN
SOCIALIZING
DECISION MAKING
SNAP DECISIONS
INDECISION/PROCRASTINATING
WANTING ALL THE FACTS
DECISION BY COMMITTEE
PLANNING
NO OBJECTIVES, PRIORITIES OR DAILY PLAN
SHIFTING PRIORITIES
LEAVING TASKS UNFINISHED
FIRE FIGHTING/CRISIS MANAGEMENT
NO SELF-IMPOSED DEADLINES
ATTEMPTING TOO MUCH/UNREALISTIC TIME ESTIMATES
ORGANIZING
PERSONAL DISORGANIZATION/STACKED DESK
DUPLICATION OF EFFORT
CONFUSED RESPONSIBILITY + AUTHORITY
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YOUR NO. 1 TIME SAVER: YOUR SECRETARY

Effective delegation of duties and responsibilities to your secretary can add considerably to your efficiency and improve your ability to manage your time. Much of what has been said previously about TS/TW's (Time Savers/Time Wasters) involves secretaries in their implementation or elimination.

Let's begin by examining a proposed job description for a professional secretary. As you read, consider your own situation. How well have you and your secretary communicated about the various elements of the job description? Everyone's situation is different, of course, but consider the following suggestions.[7]

MAIL. Answers drafted to routine letters and submitted with current, pertinent letters and file. Incoming mail arranged in order of importance. Background material gathered to facilitate action indicated in correspondence and dates checked regarding requests for future commitments. When vice-president absent for more than a few days, correspondence acknowledged or referred to others for action.

TELEPHONE. Telephone calls handled promptly, with consideration and courtesy. Messages recorded accurately and passed on or referred to other departments along with any data necessary for action to be taken. Good judgment exercised in giving out information to callers. When desirable, secretary arranges to have the vice-president return the call at a set time and prepares list of such grouped calls, with relevant information (such as the purpose of the calls) and files for ready reference. All matters that can be handled elsewhere are referred diplomatically.

APPOINTMENTS. Judgment exercised in setting up appointments and meetings to consolidate free time. Information obtained in advance as to purpose, length of time required, and so forth. Material organized for meetings, conference rooms reserved, and notices sent out in advance with agenda. All appointments and meetings recorded on calendars and updated daily.

VISITORS. Concern for comfort and convenience is shown to all visitors. Reading matter and coffee offered if waiting is necessary. Relevant files or data are on the vice president's desk in time for his review before callers arrive. When visitors appear to be staying an unreasonable length of time, the secretary phones the vice president to remind him of his next most urgent priority task and give him a reason to terminate the conversation.

HUMAN RELATIONS. The secretary gives cooperation to subordinates as well as to those in higher positions and shows a genuine interest in her job and the welfare of the company. Instructions are followed promptly and intelligently and initiative is taken when appropriate. A dignified but friendly atmosphere is maintained in the office.

OFFICE ROUTINES A systematic follow-up system is maintained so that all reports, memoranda, and notices originating from the office are submitted on time. All telephone and mailing lists are kept up to date. Office supplies are ordered and housekeeping details arranged by planning ahead. "To be discussed with" lists maintained for every person in regular contact and presented as reminders when needed.

CONFIDENTIAL MATTERS. All gossip about the company and its employees is avoided and personal matters are discreetly handled. Unless the secretary is otherwise instructed, she opens confidential mail but ensures its confidential nature. Good judgment is shown in all conversation with visitors.

TRAVEL ARRANGEMENTS. Transportation schedules are obtained well in advance of a trip and a time and route schedule is submitted for approval. Transportation and hotel reservations are confirmed and financial arrangements completed. Business data, files, and supplies for the trip are assembled and trip schedule cards are prepared, one for easy reference en route, one for family, and one for office, listing hotels, flight numbers, telephone numbers, and names of contacts. An expense report is made out and submitted after the trip.

FILING. A classification system is developed to handle all material to be kept in office and to facilitate immediate retrieval. A record retention plan is worked out and maintained to prevent unnecessary storage of files. Filing is maintained on a current basis.

OBJECTIVES AND PRIORITIES. Separate lists of long (over six months) and short-range objectives for the office are maintained, with current status indicators, revised monthly, and a regular rate of accomplishment is ensured by systematic follow-up. Daily goals and their relative priorities are set and approved the preceding day.

Here are some additional suggestions for developing an effective give and take relationship with your secretary:

1. Hold a daily conference. Review what's in the works and what needs to be accomplished. Check on upcoming deadlines and appointments.
2. Take suggestions from your secretary. Encourage feedback for ideas on improving your efforts.
3. Reprimand her in private.
4. Back her up. Everybody makes mistakes in judgment.
5. Let her know what you expect and when.
6. Don't "vanish into the night." Let her know where you are.
7. Develop a sense of humor.
8. Be careful about delegating your personal chores—errands, paying bills, etc.
9. Promote cooperation with all staff members. Who knows, you may need some emergency help someday, too.
10. Go easy on the buzzer—jot down notes and ideas rather than bother your secretary with repeated interruptions.
11. Brief your secretary on telephone developments—alerting her to expected important calls.
12. Have your secretary keep a list of due dates for staff reminders.
13. Let her answer as many of your letters as possible.
14. Give her complete responsibility for routine jobs.
15. Investigate new methods, materials and office equipment to make both your jobs easier.
16. Subscribe to appropriate publications relating to the secretarial field.
17. Encourage your secretary to participate in professional associations and seminars.
18. Don't forget to say "thank you."
19. Help her build up a library of reference and textbooks.

A common affliction of most of us is the "Cluttered Desk Syndrome." Are you a victim of the Desk Top Theorem: "the paper expands to fill the desk top space available"? One secretary and her boss came up with the following system to solve this aggravation. They set up a series of desk-organizing files containing six working units entitled: *Urgent, Dictate, To Do, Review, File and Discard.* The secretary saw to it that all items coming into the office and not handled immediately were placed in the appropriate file.

Do you dictate material to your secretary? It's wise to observe a few simple rules or guidelines when you do.

1. Determine the need for dictation.
   - Why do I need to write this.
   - What do I hope to accomplish.
   - Where do I get the necessary information.
   - Who is going to receive it.

2. Before you begin dictating:

   - Review the reference materials.
   - Organize your thoughts.
   - Outline your message.

3. While you dictate:

   - Don't mumble.
   - Communicate clearly.
   - Possess a good mental attitude.

Have you ever considered using dictating equipment? If not, examine these advantages: No need to slow down; changes are easy; No shorthand fright; Instant action; and No fixed hours.

A "Final Word." Consider the following "Secretaries' Most Common Suggestions For Bosses."

1. Keep us informed (communicate). Tell us what you expect, how we are dong, what's behind the memo, why this is important, where you are going, and when you will be back.

2. Let us make some decisions (be a team player) - especially on routine matters when we know the answer - to gain confidence and to feel an important part of the team.

3. When you dictate, be prepared (organize yourself). Don't fumble through papers, mumble into your fist, or change it all with an afterthought.

4. When you make appointments - keep them (organization). Save us embarrassment.

5. Keep your work flowing as evenly as possible (communicate, organize).

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ACKNOWLEDGMENTS

Advisory Committee

Dr. George C. Kosbab initially met with a State Advisory Committee which brainstormed for one-half day in developing suggested topics for inclusion in this professional handbook for Directors of Vocational Education. Listed below are the names of the personnel who served on this committee:

NAME	POSITION	LOCATION
John Fear	Director of Voc. Education	Mayfield City Schools
Robert Lucas	Superintendent	Licking County J.V.S.D.
James Boyd	Superintendent	Butler County J.V.S.D.
Dr. R. G. Hamrick	Superintendent	Alliance City Schools
James Frasier	Director of Voc. Education	Dayton City Schools
Donald Lenhart	Director of Voc. Education	Mahoning County J.V.S.D.
Dr. Charles Nichols	Dept. Chairman of Voc. Educ.	Kent State University
Russel Gardner	Professor of Voc. Education	Kent State University
Wilbur R. Weir	Director of Voc. Education	Medina County J.V.S.D.
Thomas Reiser	Director of Voc. Education	Scioto County J.V.S.D.
Louise Fought	Asst. to Superintendent	Penta County J.V.S.D.
Robert Hughey	Director of Voc. Education	Akron City Schools
Ronald J. Hagaman	Director of Voc. Education	Lima City Schools
Dr. George C. Kosbab	Asst. Director of Voc. Education	Ohio Division of Voc. Educ.
Dr. Byrl Shoemaker	Executive Director	Ohio Division of Voc. Educ.
Frank Oliverio	Asst. Director	Ohio Division of Voc. Educ.

Peer Leadership Cadre

In the early stages of this publication effort, an administrative committee of Dr. Byrl Shoemaker, Dr. George Kosbab, and Frank Oliverio appointed a cadre of 14 local directors of vocational education to be placed through a one week Leadership Training Seminar on the contents of this publication. Later these 14 directors were organized into seven teams of two each and they conducted seven one week regional leadership seminars for all of the 130 Ohio vocational education directors on the contents of this book. Listed below are the names of the directors who served as Peer Training Leaders.

Director's Name	Position	Location
James A Stickley	Director of Voc. Educ.	Upper Valley J.V.S.D.
Clifford Migal	Director of Voc. Educ.	Great Oaks J.V.S.D.
James Pease	Director of Voc. Educ.	Penta County J.V.S.D.
William Ruth	Director of Voc. Educ.	Lorain County J.V.S.D.
James Clendening	Director of Voc. Educ.	Buckeye J.V.S.D.
Herbert Chamberlain	Director of Voc. Educ.	Eastland J.V.S.D.
James Frasier	Director of Voc. Educ.	Dayton City Schools
Ernest Landis	Director of Voc. Educ.	Columbus City Schools
Frank Bartholow	Director of Voc. Educ.	Sylvania City Schools
Don Healas	Director of Voc. Educ.	Cleveland City Schools
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